

Technical Proposal

Response to RFP: Statewide Victim Information and Notification System

Iowa Department of Justice, Crime Victim Assistance Division

Lucas State Office Building

321 E. 12th Street

Des Moines, Iowa 50319

Information Strategies, Inc. (InfoStrat)

5101 Wisconsin Ave, NW, Suite 420

Washington, DC 20016

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Scored Technical Specifications

The following is provided in accordance with the Request for Proposals, section 3.3.2. Our response answers each item in section 4.2 by providing a sub-section for each requirement, stating the requirement and providing a response that begins with our statement of compliance.

InfoStrat proposes SAVIN360 for the State of Iowa – the solution InfoStrat has implemented for the States of Indiana, South Dakota, and Texas (and is currently implementing for Pennsylvania) with custom configurations for processes and features that are specific to Iowa. The solution is implemented as a custom configuration of Microsoft Dynamics 365 (formerly Dynamics CRM), a best-of-breed software used extensively by government agencies at every level worldwide as a line of business applications for a wide range of government functions. Dynamics 365 serves as a rapid development engine for implementing web applications.

SAVIN360 comprises two components: (1) Dynamics 365, as the data store and workflow engine, which also serves as the primary administration tool for CVAD staff and whomever else they provide access, and (2) a public-facing portal that applies role-based security to provide a wide range of features to disparate audiences.

1 General Requirements

The Statewide Victim Information and Notification System must:

1.1 Custody Status Information

Requirement:

Provide offender custody status information (including whether the offender is in custody, and offender location while in custody) on offenders in all of Iowa's 99 counties and the Iowa Department of Corrections [hereinafter "the Sites"].

Response:

InfoStrat will comply with this requirement; below is a description of our approach to meeting the requirement.

SAVIN360 provides a two-level custody status list that enables detailed tracking of custody status while at the same time providing high-level custody information for public use. The solution maintains a master list of custody statuses used; each custody status has a corresponding offender status. Offender status is a high-level status, such as In Custody, Out of Custody, Under Supervision. Custody status is more detailed listing custody: In Custody, Released – On Bond, Parole, Furlough, etc. When the custody status is set, that value is available to administrators and justice officials; the offender status is what appears in the public portal for the offender. So, justice officials might be able to see that the offender is in a medical facility (custody status = In Hospital), but the public would only see that the offender is In Custody.

The Custody Status list is configurable defining the custody status option, the associated offender status, and the jurisdictions to which it applies. The following screen provides a sample listing.

Active Custody Statuses ▾

<input type="checkbox"/>	Name ↑	Offender Status	DOC	County P...	None
	Death	Out of Custody	Yes	Yes	No
	Escape	Out of Custody	Yes	Yes	No
	General Release	Out of Custody	No	Yes	No
	In Custody	In Custody	Yes	Yes	No
	In Hospital	In Custody	Yes	Yes	No
	Out to Court	In Custody	Yes	Yes	No
	Parole	Under Supervision	Yes	Yes	No
	Release - Case Dismissed	Out of Custody	No	Yes	No

Custody Status List

CVAD users will be able to manage these records, in the event that a new custody status needs to be added or a custody status needs to be renamed or otherwise updated. The following screen shows the Custody Status form, which can be used to change various attributes of the record.

SAVE SAVE & CLOSE + NEW DEACTIVATE DELETE ASSIGN SHARE EMAIL A LINK RUN WORKFLOW ...

CUSTODY STATUS : SAVIN

Escape ≡

General

Name * Escape Offender Status Out of Custody

Definition The offender has left custody or supervision without prior authorization

Jurisdiction

DOC ☒ County Prison Yes None ☐

LE Portal Release ☐

SMS Request

Offender: {Offender Name}

Custody Status: Escaped

Custody Status Form

A standardized set of custody status values is used to eliminate confusion between jurisdictions as to specific custody values. However, to ensure each jurisdiction can continue to operate in

their normal fashion, SAVIN360 also provides a backend mapping feature. This allows our solution to map each Site's codes with our standard custody statuses. The screen below depicts how this looks in SAVIN360; in this screen, if the site with ORI CL0010001 were to send offender data using the code RLSE7, SAVIN360 would interpret that as custody status = Jail Release.

<input type="checkbox"/>	Value Type	ORI ↑	Custody Status In...	Custody Status Out	Release Detail
<input checked="" type="checkbox"/>	Custody Status	CL0010001	RLSE7	Jail Release	Jail Release
<input type="checkbox"/>	Custody Status	CL0010001	PRL	Parole	Parole
<input type="checkbox"/>	Custody Status	CL0010001	PRL2	Discharge	Discharge
<input type="checkbox"/>	Custody Status	CL0030001	PRL	Parole	Parole
<input type="checkbox"/>	Custody Status	CL0040001	RLSE	Jail Release	Jail Release

Site Custody Status Mapping

Thus, SAVIN360 provides a flexible method for managing the custody status list and mapping Site data to that list. The list can be updated over time, as well.

1.2 Data Exchange

Requirement:

Obtain updated data from all 99 counties at a minimum of every fifteen minutes and at a minimum of once every 24 hours from the Iowa Department of Corrections. Data to be collected includes offender full name, aliases, age, date of birth, gender, parole status (even when out on supervised release; for the term of the sentence), offender ID, custody status, charge, contact facility, booking date and offender's photo. Data should be collected for all offenders in each site.

Response:

InfoStrat will comply with this requirement; below is a description of our approach to meeting the requirement.

Offender Photos

Regarding photos for data exchange, in the first phase we expect that photos will be transmitted via FTP. The SAVIN360 web service that we recommend for phase two has methods for transfer of photos.

Several methods for receiving image data from source system are available including web service delivery or delivery to mapped network or secure FTP directory. Other methods of photo integration can be implemented as required. Dynamics 365 provides seamless integration with Azure Blob Storage, allowing for long-term retention of all images for an Offender.

Photo display on the portal is designed such that photos are not displayed unless requested by the constituent. This is done to prevent “re-victimizing” a person. Thus, the photo image, following a search displays a silhouette image with a Show Photo option.

OFFENDER REGISTRATION			
Name	WILLIAM SMITH	Custody Status	Parolein Other State
IDOC #	114599	Location	State of Illinois
Date of Birth	8/9/1968	Release Date	2/22/2016
Expected Release			
PROFILE			
Gender	Male	Race	Black
Eye Color	Brown	Hair Color	Black
Height	72	Weight	250

Photo available but hidden.
[Show Photo](#)

Show/Hide Photo

If the constituent is logged in as a portal user, they can in their profile settings, specify to show photos automatically. In this case, the photo is displayed but with a Hide Photo option. The following screen depicts the section of the User Profile preferences regarding photos.

OTHER PREFERENCES

Preferred language English

Annual Follow Up ☐

Show Offender Photos by Default ☒

Show/Hide Photo Preference in Portal

1.3 Anonymous Registration

Requirement:

Allow victims and survivors to anonymously register for automated notification of changes in offender status.

Response:

InfoStrat will comply with this requirement; below is a description of our approach to meeting the requirement.

While SAVIN360 was designed to collect information from registrants, including name information, these fields do not have to be required. Our primary goal is to have all contact methods for the same person linked so that it can be determined that a specific registrant did receive notification, even if a particular email bounced back or a phone call was not answered or confirmed. Our method of registering anonymously can still accomplish this goal.

Our portal allows for users to create accounts. When accounts are created, users can manage their contact information, stop notifications, change their PINs, view dashboards and take advantage of other victim services available through the portal.

Originally, creation of accounts was required by the states that implemented the solution. Name data was requested but not required; even then, the user could enter a pseudonym. However, recently we added a feature to allow for truly anonymous. This is depicted in the screen below.

Offender Details

Name	Custody Status	Race	Height
Test Offender	In Custody	Unknown	—
Current Facility ID	Facility	Sex	Weight
—	SCI CAMBRIDGE SPRINGS	—	—
DOC Number	Release Date		Hair Color
—	—		—
Parole Board Number			Eye Color
—			—

Offender IDs

Agency	Offender ID Number ↑	Intake Date	Release Date
There are no records to display.			

[Sign in here to subscribe to offender.](#)
[Or click here to subscribe anonymously to offender.](#)

Anonymous Registration Option

An option is added to the details page for users that have not logged in to subscribe anonymously. This opens a page that allows for entry for contact information. However, once these are entered, the user will not be able to change the values later nor will they be able to stop phone calls via the portal.

When registered as Anonymous, the registrant will still be able to create a portal account later and link their portal account with their existing registration data.

1.4 Registration Options

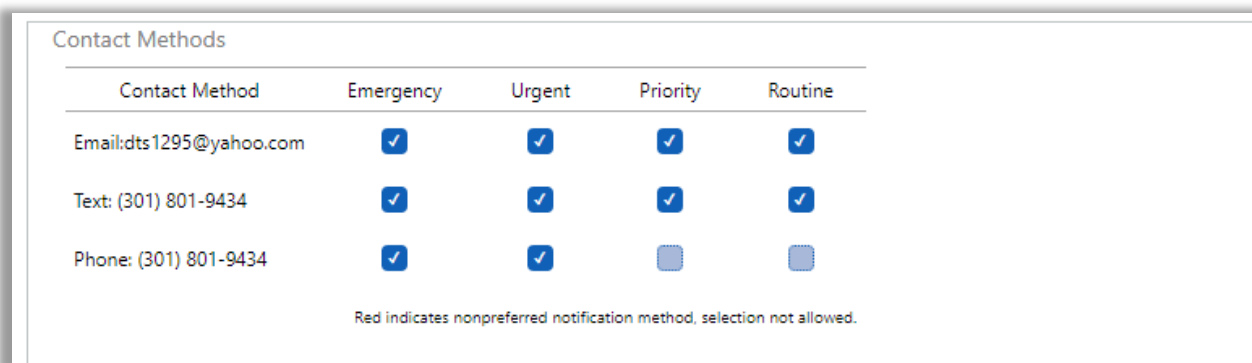
Requirement:

Allow victims or survivors to complete registration using a telephone number, email address or both.

Response:

InfoStrat will comply with this requirement; below is a description of our approach to meeting the requirement.

SAVIN360 is configured to allow users to register for notifications by phone call, email, and text; letter notifications are also available. When a person provides a mobile phone number for notifications, we provide notification options for both phone call and text.



Contact Method	Emergency	Urgent	Priority	Routine
Email:dts1295@yahoo.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Text: (301) 801-9434	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Phone: (301) 801-9434	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Red indicates nonpreferred notification method, selection not allowed.

Notification Method Selection in SAVIN360

InfoStrat will conduct validation of phone numbers defined as mobile phones at time of entry to ensure that they are mobile enabled. This prevents additional cost and prevents false negative missed notifications (text notification could not be provided) at the time of notification.

SAVIN360 can also integrate with other types of communication services, so long as they provide a suitable API. InfoStrat is currently investigating the possibility of using such methods as instant messaging software (e.g., Skype, Facebook Messenger, etc.) for notifications.

Registrant Relationship to Offender

While it is not required, SAVIN360 provides a means for identifying the relationship between the registrant and offender. The Offender Relationship is a configurable master list of relationships that Dynamics 365 power users can manage. By using this feature, additional options can be provided, such as notifications only available to Victims, as well as providing a list of persons for which other services can be provided.

1.5 Phone or Web Registration

Requirement:

Allow victims and survivors to register by calling a toll-free telephone number or by using a dedicated website.

Response:

InfoStrat will comply with this requirement; below is a description of our approach to meeting the requirement.

Registrants can register via phone call to a toll-free number or via portal provided for the state.

Regarding the toll-free number, InfoStrat offers the state two options: to register via IVR or have the registrant speak with a live operator who can register the person for notifications regarding one or more offenders either as an anonymous user or as a defined user; if desired, the call center operator will create a portal account for the registrant, who can then take over management of their notification schema.

The Portal will provide a wide range of options for victims and survivors to register either anonymously or as a defined user. For a comprehensive discussion of the portal, see the Public Facing Portal description in the features list on page **Error! Bookmark not defined.**. The Portal allows registrants to manage their notifications, contact data and use other system features (such as the Service Provider Registry).

InfoStrat will work with our third-party Call Center to implement a touch based IVR solution to provide Offender search and register features. Such a solution would ask callers what they want to do and provide a menu with verbiage like “press 1 to search for an Offender” or “press 2 to register for notification” and so forth. InfoStrat would work with CVAD staff to design the menu script and IVR requirements. The solution will provide options for speaking to a live operator as well.

While IVR presents a cheaper ongoing cost, InfoStrat believes that immediate direction of calls to a live operator is a better, more service-oriented option. Various industry studies demonstrate a high disregard of IVR systems, with many people looking immediately for an option to speak with a person. IVR systems entail a higher up-front cost with associated negligible back end costs. Nevertheless, most IVR systems still require a “speak to operator” option and require an operator or bank of operators at standby, should the caller seek the live operator option.

In other states, we’ve learned that one of the highlights of the solution is that when victims call in, they speak to a real person, and they appreciate it. When someone calls in, after an initial message, they are speaking with a skilled person, trained in victim needs and sensitivity. That person can help locate an offender, register the person for notifications—both capabilities of an IVR system, but with the two-way communication more likely to achieve the proper result faster. In addition, the operator can provide helpful information or contact information for a services resource or facility contact, and can also take messages for follow up by a more informed person regarding state or county policies, and so forth. Often, the victims simply appreciate having a real person to talk to.

If the state wants to reduce inbound call costs, InfoStrat can implement a two-tiered approach where calls are directed to CVAD staff during the work day (based on availability using a cloud-based PBX solution) and to a live operator during non-working hours. Pricing in this proposal assumes that this requirement will be fulfilled as written, however, at the time of contracting, the state may opt to use the direct to operator options and workday routing to CVAD, for which adjusted pricing would be provided.

1.6 Phone Notification

Requirement:

Allow notifications to be sent to multiple phone numbers, including cell phones and landlines.

Response:

InfoStrat will comply with this requirement; below is a description of our approach to meeting the requirement.

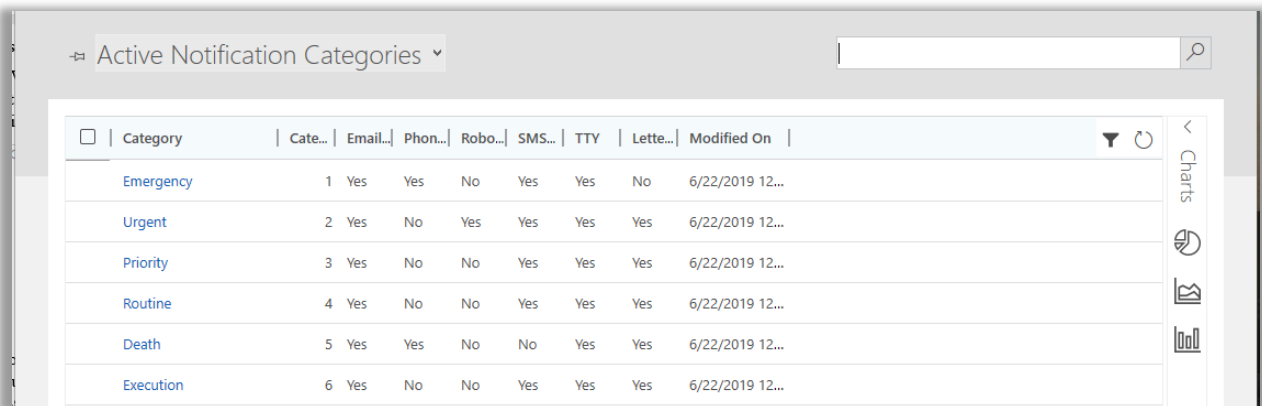
Registrants can register any number of phone numbers; for each, they will be asked to identify whether it is landline or mobile. Registrants can choose to be notified in specific ways for each

category of notification for each phone number. So, for example, if a registrant provided 3 phone numbers, two of which were landline and one was mobile, the registrant could say call all three for emergency and urgent events, but only call the mobile phone for priority and routine events.

The SAVIN360 solution provides for categorization of events that is used to determine what methods of notification are most appropriate for the event and when calls and recalls should be permitted. For example, late night phone calls would not typically be appropriate for a movement between correctional facilities, nor is it imperative that a call be made every hour for such a movement.

SAVIN360 differentiates between types of events with the understanding that some events are more time sensitive or more urgent. A categorization scheme that is applied to notification event definitions that is used to determine recall rates, phone call time of day allowances, and communication methods to be included for a specific event

Categories are configurable within SAVIN360. So CVAD would be able to define their own schema including the naming of the categories, the hierarchy, and the notification method allowances, including whether after hours calls are permitted and the call cycles. The following screen depicts one possible list of categories (in the schema pictured, the Execution category has logic to only be available if the offender is on death row).



Category	Cate...	Email...	Phon...	Robo...	SMS...	TTY	Lette...	Modified On
Emergency	1	Yes	Yes	No	Yes	Yes	No	6/22/2019 12...
Urgent	2	Yes	No	Yes	Yes	Yes	Yes	6/22/2019 12...
Priority	3	Yes	No	No	Yes	Yes	Yes	6/22/2019 12...
Routine	4	Yes	No	No	Yes	Yes	Yes	6/22/2019 12...
Death	5	Yes	Yes	No	No	Yes	Yes	6/22/2019 12...
Execution	6	Yes	No	No	Yes	Yes	Yes	6/22/2019 12...

A typical SAVIN360 categorization schema includes the following:

- **Emergency:** these are events in which the offender is no longer in custody and for which advanced warning of such could not be provided (i.e., escape, conviction overturned)
- **Urgent:** these are events in which the offender is no longer in custody but advanced warning could be provided (parole and probation releases, completed sentence, hearing rescheduled to within a few days, reduction in custodial security level)
- **Priority:** these are events that are time bound, but do not entail release from custody (i.e., court or parole hearings, significant change of release date due to time cut)
- **Routine:** events which do not have any time critical element and, for public safety or other compelling reasons, may be better delaying notification until several hours or even days after the fact (i.e., movements between facilities, death of inmate, advanced notification of pending release)

This schema enables SAVIN360 to provide notifications most appropriately about time of day, communication channel and event urgency. Thus, there is no calling at 2:00 am for non-Emergency events. This also provides a means to minimize extraneous cost for unnecessary notifications.

SAVIN360 uses the Categorization Schema to allow constituents to specify how they would like to be notified by category based on the method allowances established by the sponsor. The following screen depicts how a constituent can specify how to be notified for specific categories of events and can vary the methods for each offender.

Contact Method	Emergency	Urgent	Priority	Routine
Email: dts1295@yahoo.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Text: (301) 801-9434	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Phone: (301) 801-9434	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Red indicates nonpreferred notification method, selection not allowed.

Notification Options by Category

The schema also allows for variations in recall rates and afterhours notification allowances. For each Category, you can provide a name, set the level, determine what types of notification can be conducted for that category, if phone or robo-call, what call cycles can be used and can after hours notifications be provided. All this is configurable to the SAVIN360 administrator. The following screen shows the configuration form for Categories.

NOTIFICATION CATEGORY : SAVIN
Emergency

General

Category: Emergency Category Number: 1

Description: Notifications regarding an escape from custody and recapture.

Allowances

Phone	Yes	Email	Yes	Mobile	No
Robo	No	SMS	Yes	Social	No
TTY	Yes	Letter	No	IM	No

Phone After Hours: Yes

Phone Cycle 1 Wait	15	Phone Cycle 2 Wait	60	Phone Cycle 3 Wait	120
Phone Cycle 1 Max	8	Phone Cycle 2 Max	22	Phone Cycle 3 Max	12

Special Condition: Show/Hide:

Entity: ID field:

In the above screen, you can see that for emergency conditions, phone calls (personal), TTY, Email, and SMS are all permitted. For the personal calls, the recall rate uses a 3-cycle methodology in which:

- In the first cycle, calls will be made every 15 minutes for up to 8 attempts;
- In the second cycle, if the call has not been confirmed, calls are made every 60 minutes for 22 attempts;
- In the third cycle, if the call has not been confirmed, calls are made every 120 minutes for 12 attempts.

The idea is that calls are more urgent immediately after the event and get less urgent over time, particularly as certain milestones are met. When configuring for a category, you can use just one cycle or all three; and you can use a different schema for each category. For example, you can use the schema described above for emergency events; for urgent events, you can use a schema of hourly robo-calls for the first 6 hours and then every 2 hours for up to 16 attempts with no afterhours calls; for priority events, the schema might be robo-calls every 4 hours for 12 cycles and no afterhours calls; and for routine events, the schema might be robo-calls every 6 hours for 8 cycles, with no afterhours calls, and if 2 voicemails are left the call process is completed. It could also be set that, unless the registrant only has landline phone numbers, phone calls are not permitted for Priority and Routine events.

You also can set certain milestones such as completing one category on answer or leaving voicemail. And you can limit the number of voicemails that are left; so for example, a voicemail in Cycle 1 completes Cycle 1 and initiates Cycle 2 and a voicemail in Cycle prevents leaving any more voicemails.

SAVIN360 offers a “Confirm One Confirms All” schema. In this schema, if someone registers multiple with phone numbers, once they have entered their PIN to confirm on one of the phone numbers, calls are discontinued for all phone numbers.

SAVIN360 also provides other phone tracking options. These include:

- Stopping all calls if the recipient phone number is out of service and creating a task to follow up with the registrant if there are other contact methods.
- Providing an option for people who did not sign up and inherited a phone number to press 9-9-9 to alert the system of a wrong number; this also results in a follow up task to ensure that the recipient really is a wrong number and not someone who couldn’t remember their PIN.
- Create a task if a phone number goes through the entire cycle without ever being answered. This allows for following up to determine if the number is still being used.

1.7 Victim Registration Management

Requirement:

Allow registered victims or survivors to update, change or cancel their registration information by calling a toll-free telephone number or by using a dedicated website.

Response:

InfoStrat will comply with this requirement; below is a description of our approach to meeting the requirement.

Registrants with portal accounts can modify their registration at any time via the portal. Any registrant may call in to modify their registration information. This could occur via IVR or live operator via the toll-free number; dial in would be the only options for a registrant who registered anonymously.

When calling in with IVR, the registrant will be given options for Offender Search, Registration, and Modify Registrations. If Modify Registrations is selected, the registrant would be prompted for Phone Number and PIN, and once provided, a list of Offenders for whom the person is registered will be provided. The registrant will then be asked to select which registration to update; if there is more than one, the registrant will be able to select a specific registration or all. Once a selection is made, the registrant will then be asked what option to perform: add phone number, remove phone number, deactivate registration.

When updating via live operator, the registrant will inform the operator. The operator will be able to search on any data value: name, phone number, email address, system assigned ID. Once that person's record is located, the operator will be able to view all registrations for the registrant and then make any requested updates. The registrant will be required to provide PIN or answer their security question before the operator will make any changes.

Registrants with portal accounts will be able to login and update their information.

SAVIN360 also can send an annual follow up to any non-anonymous registrant who has not updated their contact information in the last year to make sure that the contact information still is accurate. This ensures that the contact data for registrants remains as "fresh" as possible and that registrants who have not been contacted in a long time can retrieve their information (e.g., PIN Numbers) more readily.

1.8 Continuous Registration

Requirement:

Update any changes in an offender's location or custody status without requiring registered victims and survivors to update their registration or re- register.

Response:

InfoStrat will comply with this requirement; below is a description of our approach to meeting the requirement.

1.9 Automated Notification

Requirement:

Disseminate automated notifications by telephone, email and text message 24 hours a day, 7 days a week, 365 days a year to registered victims and survivors within 15 minutes of a custody status change. Clarified from Q&A: Notifications must be disseminated within 15 minutes of the receipt of updated data; preferably, notifications will be disseminated immediately upon receipt of updated data.

Response:

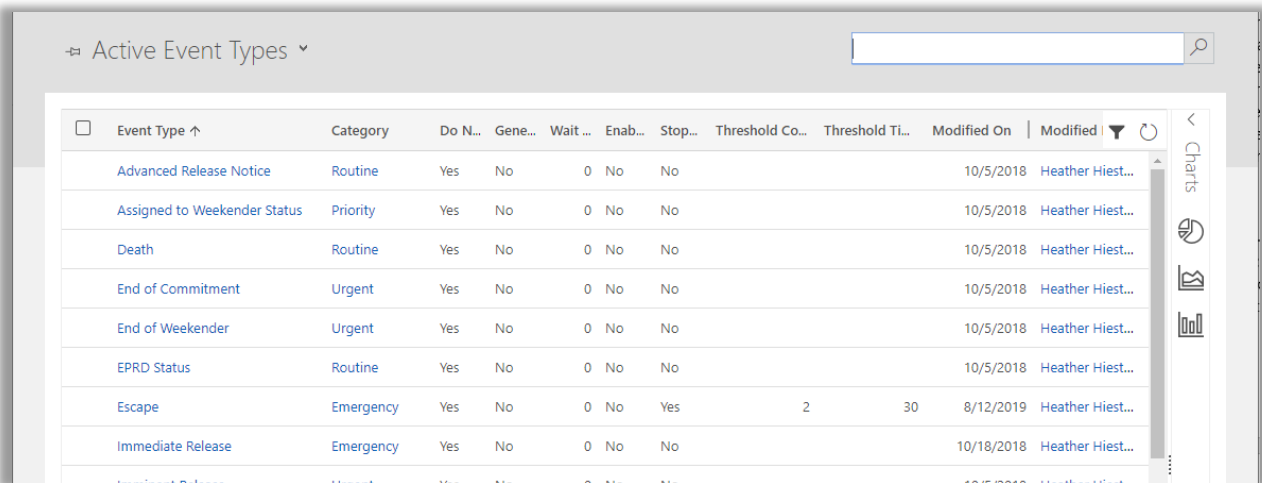
InfoStrat will comply with this requirement; below is a description of our approach to meeting the requirement.

SAVIN360 provides automated notifications 24/7/365, with some constraints placed intentionally on types of events. For example, a person need not be awakened at 2 AM to be told about a routine event, such as a prison transfer or an end of sentence for a parolee (given that the offender is already in the community). Registrants are given the options as to what methods of notification (phone, text, email) should be used for the different categories of events; see our response to section.

As part of the notification process, SAVIN360 provides a set of features to ensure that notification should be performed and when. All notifications are based on the creation of an Event for an Offender. An event is created when data are received concerning an offender and the data indicate some type of reportable change has occurred.

When changes are made to the offender record SAVIN360 provides before and after logic to interpret the change. This underscores the concept that a change in custody status may have a different meaning depending on what the previous custody status was. For example, an End of Sentence for someone who is on parole has a different meaning than it would for someone who is incarcerated in a correctional facility. In another example, someone who went to court from work release and then returns to work release has simply returned from court; conversely, someone who goes from a correctional facility to court and then to work release has been assigned to work release. SAVIN360 allows flexibility in determining what notification should occur based on current and previous custody status. This logic is used to determine the type of event.

SAVIN360 provides a configurable entity called Event Types in which the rules and messaging for notification are determined. Event Types are a list of all types of notifications in the system and provide for rapid development of new types of notifications.



Event Type ↑	Category	Do N...	Gene...	Wait ...	Enab...	Stop...	Threshold Co...	Threshold TI...	Modified On	Modified
Advanced Release Notice	Routine	Yes	No	0	No	No			10/5/2018	Heather Hiest...
Assigned to Weekender Status	Priority	Yes	No	0	No	No			10/5/2018	Heather Hiest...
Death	Routine	Yes	No	0	No	No			10/5/2018	Heather Hiest...
End of Commitment	Urgent	Yes	No	0	No	No			10/5/2018	Heather Hiest...
End of Weekender	Urgent	Yes	No	0	No	No			10/5/2018	Heather Hiest...
EPRD Status	Routine	Yes	No	0	No	No			10/5/2018	Heather Hiest...
Escape	Emergency	Yes	No	0	No	Yes	2	30	8/12/2019	Heather Hiest...
Immediate Release	Emergency	Yes	No	0	No	No			10/18/2018	Heather Hiest...
Imminent Release	Urgent	Yes	No	0	No	No			10/5/2018	Heather Hiest...

Event Type List

SAVIN360 notifications also provide a set of other features that are useful in ensuring the most accurate notifications are provided. A power user in Dynamics 365 would be able to configure the following:

- Category of the Event: see our description of categories in our response to requirement 1.6 for details.
- Notification Wait Time: set a pre-defined delay, described in the subsection below.
- After Hours Calls Allowance: derived from the category configuration, but also allows to vary from the category value for a specific Event Type.
- Do Not Process: used to prevent notifications from starting automatically, usually used for testing new notifications.
- Victim Only: used to specify that notifications for the Event Type can only be provided to registrants defined as victims (see our response to Requirement 1.4 for more information of registrant-offender relationship)
- General Notification: used to specify that notifications for the Event Type are available to all registrants.
- Notification Governor: a set of settings that provide monitoring for possible data corruption from a Site. A more detailed description is provided below.
- Robo-call Settings: derived from the category configuration, but also allows to vary from the category cycle structure for a specific Event Type.

Backdated Data

SAVIN360 provides special handling procedures for backdated data, which can be a recurring issue from various data sources. At times, an offender record is updated in the source data system for an event that is past. For example, an offender is released from prison on Friday, but the record is not updated until Monday. In this case, the data is three days old and may have been superseded by a booking in the meantime.

SAVIN360 provides an alerting capability for backdated data, pausing notifications before any are sent and allowing Victim Services staff to validate the change and modify the notification message if needed prior to sending the notification. In addition, backdate logic can be varied by type of Event, so that two days would be the backdate threshold for most events, but for Transfer events, the backdate threshold is five days to accommodate stop-overs (a prison transfer in which the offender stays a night or two at a facility that is not the final destination).

Notification Governor

SAVIN360 provides a means of preventing erroneous notification that can occur when a source system erroneously passes many changes that are not accurate. The SAVIN360 solution uses an event-based governor in which each Event Type is given its own threshold and if a threshold is crossed, only notifications for that event are stopped until a determination is made as to accuracy. For example, 30 Parole Releases in an hour is probably not an issue, whereas 5 Deaths in an hour may indicate a data concern.

Thus, if the five deaths per hour threshold is crossed, an alert is sent to the Victim Services staff but only Death notifications are held while the situation is investigated; all other types of notifications continue. If it is determined that the five Deaths were in error, any notifications that would have been sent can be cancelled; if it was not an error, the notifications can be continued with a single mouse click by an administrator. The following screen depicts configuration of the notification governor.

EVENT TYPE : ADMIN
Death

Modified On: 10/5/2018
Stopped: No

Notification Governor	
Enabled	Yes
Threshold Count	5
Threshold Time (minutes)	60
Stopped	No
Last Governor Stoppage	-----

Notification Governor Configuration Screen

Were the threshold crossed for this event type, the stopped value would be “Yes” and there would be a Date/Time value in the Last Governor Stoppage field.

Clarify Changes

SAVIN360 before and after logic also allows for a task to be created when a data change occurs that makes no sense. For example, if a Parole Release was received for an offender whose previous custody status was Death, we would create a task to look into this change rather than simply send out Parole Release notifications. This enables the Victim Services staff to clarify anything that does not meet normal conditions before sending notifications to registrants, only to confuse them.

Deconflicting Duplicate Custody Claims

Occasionally one Site will attempt to update an offender that is currently listed as in the jurisdiction of another Site. When this occurs, no change is made to the offender; instead, a task is created to deconflict. That task will have data fields allow the Victim Services staff to update the offender to use the new Site or decline the update. In either case, SAVIN360 will make the appropriate changes, based on the selection and any subsequent notifications will be triggered.

Configurable Wait Times

SAVIN360, via the Event Type record allows you to establish a pre-defined wait before starting notifications for specific Event Types. Typically, this is used for Transfers or accompanied Temporary Leaves, in which notifying right away could put the escorting officers in danger. The following screen depicts a 240-minute wait for Transfer Notifications.

EVENT TYPE : ADMIN
Transfer

Modified On: 8/15/2019
Stopped: No

General

Event Type	Transfer	Do Not Process	<input checked="" type="checkbox"/>
Category	Routine	Victim Only	No
Wait Notification Time	240	General Notification	<input type="checkbox"/>
After Hours Calls	No		

Event Type Configuration Screen

Sub-Requirements for section 1.9:

Respondent proposals must describe the notification pattern for each notification type including the following information:

1.9.1. How notification is initiated:

Response:

Most notifications in SAVIN360 are initiated by a change in offender data. As updates are received from a Site, the update is immediately applied to the offender record. At this point, workflows are automatically triggered to apply the before and after logic described above to determine if the event is reportable and if so, what is the Event Type. At this point, an Event with that Event Type is created, and this triggers the creation of a Notification record for each registrant of that offender. Any intentional delays, if any, are applied and then notifications begin for the requested contact methods for each registrant.

In addition to notifications triggered by data feeds from Sites, SAVIN360 provides for users with enough permissions to manually initiate notifications by manually updating offender data or manually creating an event. In fact, we typically configure for a manual notification Event Type to cover for unforeseen or unexpected scenarios.

1.9.2. How often notifications on a single event are triggered;

Response:

By using the before and after logic, SAVIN360 does not conduct additional notifications of the same event when the same data are received from a Site for an offender SAVIN360 will only perform notifications for the first time such data are received; subsequent updates with the same data will then be reviewed, and a determination made that no change has occurred.

1.9.3. How notifications are stopped

Response:

There are several possible means of stopping notifications before they have started and after. The Event Type has the Do Not Process option to enable creation of all entities needed to conduct notification but preventing the sending of such. Again, the backdate logic prevents notifications from being sent. In both cases, you can choose to send the notifications once you are content with the content of them.

For notifications in process, email and text notifications are sent once any pre-defined delays have elapsed. These are one-time notifications that do not repeatedly send (though, this can easily be configured to repeat until confirmation). Thus, stopping notifications usually means stopping notification phone calls. The following methods can be used to stop notification calls:

- Confirming the phone call by applying the registrant defined PIN (this stops calls for all phone numbers provided by the registrant).
- Using the 9-9-9 option in place of the PIN to indicate a wrong number.
- The registrant can open the notification from their dashboard in the portal and click Stop Notifications.

My Dashboard

My Registrations

My Recent Notifications

Search

Offender	SID	TDCJ Number	Event Type	Event Date ↓	Category	Email Requested	Letter Requested	Phone Requested	SMS Requested	TTY Requested	
Simpson, Homer	homer123	12345678	Parole Eligibility Process (Case Pull)	6/17/2019 8:00 AM	Priority	Yes	Yes	No	Yes	No	View Details

My Recent Registrations from Portal Dashboard

Clicking the Offender Name or the View Details option opens a page with details about the notification. On this page is an option to stop notification calls.

My Recent Notification Detail

Event Name
Parole Eligibility Process (Case Pull)

Offender
Simpson, Homer

Event Type *
Parole Eligibility Process (Case Pull)

Event Date *
6/17/2019 8:00 AM

Notification

Usted se ha registrado para recibir notificaciones para el siguiente ofensor: Simpson, Homer , SID #: homer123, TDCJ #: 12345678. La División de Servicios a Víctimas (VSD) del Departamento de Justicia Criminal de Texas (TDCJ) envía nuestras sinceras disculpas por la victimización criminal que ha sufrido. Nuestro objetivo es brindarle asistencia durante su participación en el proceso de justicia criminal.

La presente comunicación es para notificarle que la División de Libertad Condicional del TDCJ está procesando el caso de este ofensor para revisión por parte de la Junta de Indultos y Libertad Condicional (BPP) de Texas a partir del 6/17/2019. El objetivo de la revisión es que la BPP decida si liberará al ofensor en supervisión. Estar en supervisión significa que el ofensor cumpliría el resto de su condena en la comunidad bajo la supervisión de una autoridad de libertad condicional. Estas revisiones se completan normalmente durante dos a cuatro meses.

Sabemos lo difícil que puede ser para usted escribir sobre los efectos de este crimen, pero le invitamos si desea enviar cartas que ayudarían a la BPP a comprender cómo la ofensa le ha afectado. Para asegurarnos de recibir sus comentarios antes de votar sobre el caso, le solicitamos que responda a nuestra oficina tan pronto sea posible por correo electrónico, correo postal o fax a la información de contacto enumerada a continuación. Mencione el Número de Identificación Estatal o del TDCJ cuando envíe material. Sugerimos que conserve copias del material enviado, ya que este permanecerá en el expediente permanente del ofensor para revisiones futuras y se mantendrá confidencial. Cualquier información que proporcione será considerada por la Junta antes de

Stop Phone Notification for This Event

☐ No ☒ Yes

Notification Details

Event Type	Type	Offender (Notification)	SID (Notification)	TDCJ Number (Notification)	Category	Requested	Sent ↓	Sent Date	Returned	Returned Date	Confirmed	Confi Time
Parole Eligibility Process (Case Pull)	Email	Simpson, Homer	homer123	12345678	Priority	Yes	Yes	6/17/2019 9:53 AM	No		No	

Stop Notifications from Notification Details on Portal

- The registrant can call the call center and request the operator stop the phone; the operator can find the notification by searching on the phone number to find the registrant's record in Dynamics 365; the operator can then click a button on the Notification that will stop all calls. This button is outlined in the screen below.



Stop Notifications from Notification in Dynamics 365

1.9.4. Whether any confirmation of delivery occurs.

Response:

The SAVIN360 solution currently is configured to confirm phone calls by use of a PIN or by using the Stop Notification feature described on the portal above.

1.10 Live Operator

Requirement:

Allow registered victims and survivors to be able to contact a live operator who is trained in victim sensitivity.

Response:

InfoStrat will comply with this requirement; below is a description of our approach to meeting the requirement.

InfoStrat uses a third-party call center, Westpark Communications LLC, to provide 24/7/365 operator assistance for those individuals who need or wish to speak with an operator or who have rotary phones. Westpark currently provides afterhours call center services for the Texas Department of Criminal Justice implementation.

Westpark Operators are trained in SAVIN360 operations and victim services, including victim sensitivity. In addition, the Dynamics 365 contains a knowledge base that will be accessible to the operators wherein CVAD staff can provide valuable information regarding state statutes and rules, state and local programs and services available to victims and survivors, and other information pertinent to state victim services. This knowledge base is searchable by subject, by keywords or by any text contained in the article and can be a great help to phone operators.

In addition, the call center will be able to provide language translation services for non-traditional languages, such as Bosnian and Somali, which are currently provided by the state; it also makes support easier should new languages need to be added.

Our pricing assumes a 24/7/365 call center for CVAD. However, if CVAD is interested in cost reduction, this is an optimal place to do that, by directing calls to the CVAD victim services staff during regular business hours and using the call center for after-hours calls. This not only reduces operational costs, it provides a better overall experience for the victim or survivor as

victim services staff fully understand state resources, statutes, programs, eligibility, and potentially other systems of record.

1.11 Portal

Requirement:

Maintain, enhance and provide updates for a portal which allows the CVAD to view all profiles and registrations as well as notifications sent. This portal will also allow the CVAD to stop calls, modify a profile and/or delete a registration; as well as set up users at local agencies to have similar abilities.

Response:

SAVIN360 comprises two components: Dynamics 365, which serves as an admin porta and a public facing portal.

Dynamics 365 Admin Portal

Dynamics 365 provides a web-based user interface that serve as the administration portal for CVAD users. All SAVIN360 features are configured in Dynamics 365 and will be available to CVAD users based on permissions. Users with appropriate permissions will be able to:

- Register constituents and update registration data
- Merge duplicated registration data
- Update Offender data
- Manually initiate notifications
- Stop notifications
- Manage backdates, duplicates, data conflicts, and other unexpected data conditions
- Create email and document templates and initiate mass email sends like a marketing campaign.
- Manage notification rules, categories, and other master data within the system
- Add backend mappings for new codes for a Site
- Handle feedback from SMS replies and website comments
- Handle undeliverable email
- Add knowledge base articles to the system
- Handle situations in which the notification governor was triggered
- Create tasks, emails, phone calls, text messages, appointments and other case management activities
- View all notifications that were sent including all message text generated.

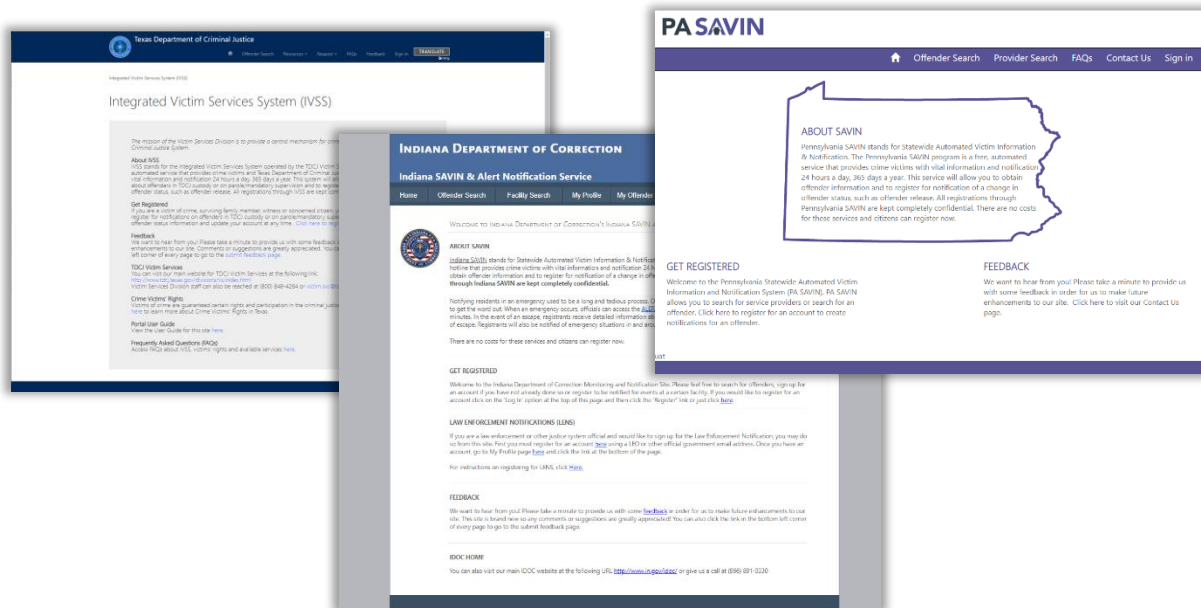
To reduce licensure costs, InfoStrat recommends CVAD users be Dynamics 365 users while local agency users have elevated access in the SAVIN360 Portal. If CVAD prefers local agency users to also work within Dynamics 365, there will be additional license costs. InfoStrat has provided pricing for Dynamics 365 based on your Enterprise Agreement with Microsoft. Non-CVAD users will likely use Power Apps basic licensing.

For more details on the Admin Porta, please see our response to requirement 9 and its subsections.

Public Portal

In addition to Dynamics 365, SAVIN360 provides a public portal available from any web enabled device. The portal allows users to traverse certain features anonymously but also allows users to create a portal account that provides the full suite of public features.

One point concerning the portal is that it is an Iowa specific portal, with Iowa branding and its own URL that uses a .gov domain. This will be your portal, with your look and feel, the menu and layout options and features that you choose, and for which you will have some capability to update. It will not be the “Iowa section” of a commercial website. By way of example, the following image are thumbnails of other state’s SAVIN360 portal



State SAVIN360 Portals

The portal provides a wide array of features for anonymous users and even more for logged in users. Anonymous users can:

- conduct an offender search
- provide feedback/questions
- view FAQs
- view victim services links
- register for an offender
- create a portal account
- view a list of victim services providers within the state.

Logged in users can do all the above plus:

- manage their contact data
- register for notification
- manage registrations
- view the list of all registrations

- view their notification history
- stop notification calls
- subscribe to victim services providers

In addition, logged in users who are criminal justice professionals can apply for specialty portal access. Specialty portals provide more features pertinent to victim services and law enforcement staff in the counties. More details are provided in the next subsection. The following screen provides an example application for specialty portal access.

Sample Specialty Portal Application Screen

Specialty Portal

The SAVIN360 portal also provides a set of specialty portals. Examples include a Law Enforcement portal, a Victim Advocate portal, and an administrator portal. Other portals can be configured as well. Features currently available include:

- Law Enforcement Portal—provides extended capability for approved law enforcement users allowing them to view the current population for their jurisdiction and provide proxy registration services for their constituents. This portal is used for jails that are in an outage condition to update Offender records and add new offenders.
- Victim Advocate Portal— provides extended capability for approved county victim services users such as reviewing, creating and updating registrations, running reports of registration and notification statistics for their county.

Specialty portals require assignment of roles and typically include an application and approval process with recurring renewal requirements. Thus, for the Law Enforcement portal, a user who wished access can apply through the public portal, the application entails specification of the jurisdiction and requires a specific type of email account associated with a law enforcement

agency (for example, Gmail and Hotmail are excluded in most cases); this initiates an approval process within Dynamics 365. Once approved, the person retains the role for a specified period, usually one year, wherein they reapply for renewal, which also entails an approval process.

1.12 Ad Hoc Reporting

Requirement:

Provide the ability within the system for the CVAD to create ad hoc reports reflecting any and all data fields captured by the system.

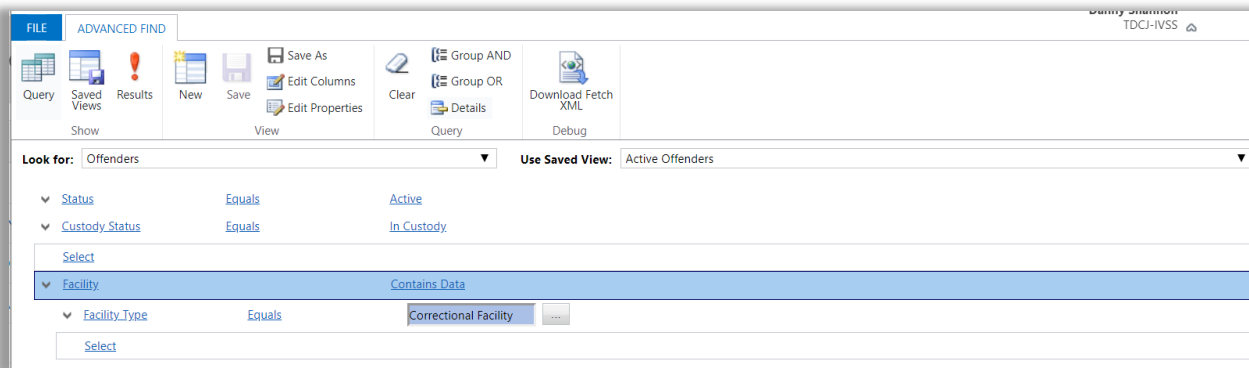
Response:

SAVIN360 provides an array of reporting tools native to Dynamics 365 that can be used for Ad Hoc reporting. Dynamics 365 has the following feature that can be used for ad hoc reporting. Ad hoc reports features include Advanced Finds, Charts, Dashboards, and Report Wizard reports

Ad hoc reporting will be available from Dynamics 365. County users will need to log into Dynamics 365 to take advantage of these features. CVAD and state users will have access to Dynamics 365. All ad hoc report options provide a Save capability that allows the user to save their report as a personal view, report, chart, dashboard that can then be shared with other users.

Advanced Find

Ad hoc reports that are simply raw data presentations can be built using the Advanced Find tool in Dynamics 365; this tool allows the user to report data from a single entity and any associated records where the entity is on the one side of a one-to-many relationship. The Advance Find allows the user to filter on any of the data attributes of the entity and related entities and present the data in a table format; users can define two levels of sorting. The following screen shows the Advanced Find query building screen.



Advanced Find Query Screen

An Advanced Find search can be saved as a Personal View and reused as needed (using the Save or Save As buttons in the screen above). The following screen shows the list of saved Personal Views (under the heading My Views) for the Offender entity.

Active Offenders Search for records

Offender Status	Source	Facility	IDOC Number
In Custody	InTake Cod...	Putnam County Jail	
In Custody	Check Sent...	Marion County Jail	test0002
Under Supervision	InTake Cod...	Reception Diagnostic Center	
In Custody	SVORReview...	Marion County Jail	
In Custody	Event Cust...	Scott County Jail	
Out of Custody	Proslink		
Out of Custody	Local Jail API		
Out of Custody	Local Jail API		
Under Supervision	Event Cust...	State of Arkansas	774775
Out of Custody	OIS		163762
	COURT		
	COURT		
In Custody		Reception Diagnostic Center	622889
In Custody	Event Cust...	Montgomery County Jail	
Out of Custody	SVORReview...		967246
In Custody	OIS		165819
Under Supervision	Event Cust...	Re-Entry Parole District	120214
Unsupervised Custody	OIS	Terre Haute Parole District	925412
In Custody	MarionCo	an Undisclosed facility	3456
Out of Custody	Local Jail API		
In Custody	OIS	Rockville Correctional Facility	239835
In Custody	Custody St...	Branchville Correctional Facility	
Out of Custody	Local Jail API		
	Proslink		
In Custody	Event Cust...	Johnson County Jail	218883

1 - 250 of 500

Views List including Personal Views

Once saved, the Advanced Find view can then be shared with other users. The following screen shows the personal view sharing screen of Dynamics 365.

Who would you like to share the selected saved view with?

Select the users or teams with whom you want to share the 1 saved view record you have selected. Then, use the check boxes on the right to specify which permissions to give each user or team.

Name	Read	Write	Delete	Append	Assign	Share
Katie Wilson	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Common Tasks

- Add User/Team
- Remove Selected Items
- Toggle All Permissions of the Selected Items
- Reset

Get Help with Sharing

View Sharing Screen

Charts

Users can also build personal charts based on any data view for an entity. These charts can help to display data in a more meaningful way. Charts are available from the related list for which the chart was built. The following screen shows the charts panel for the data feed list.

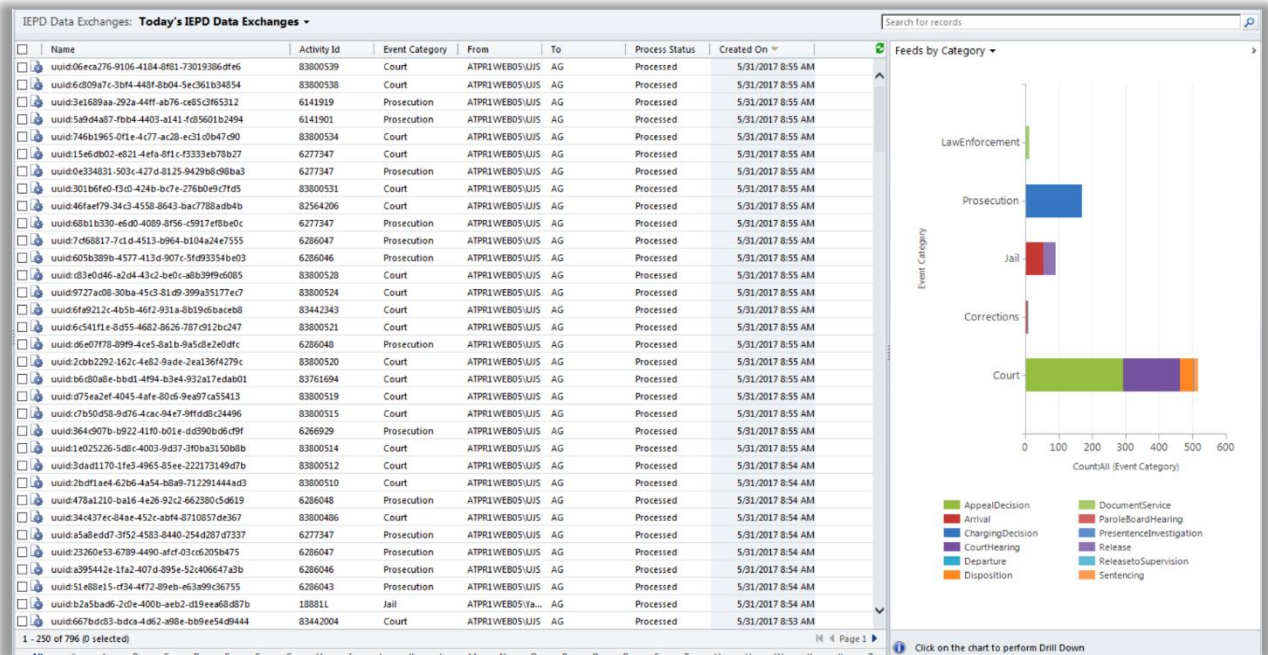
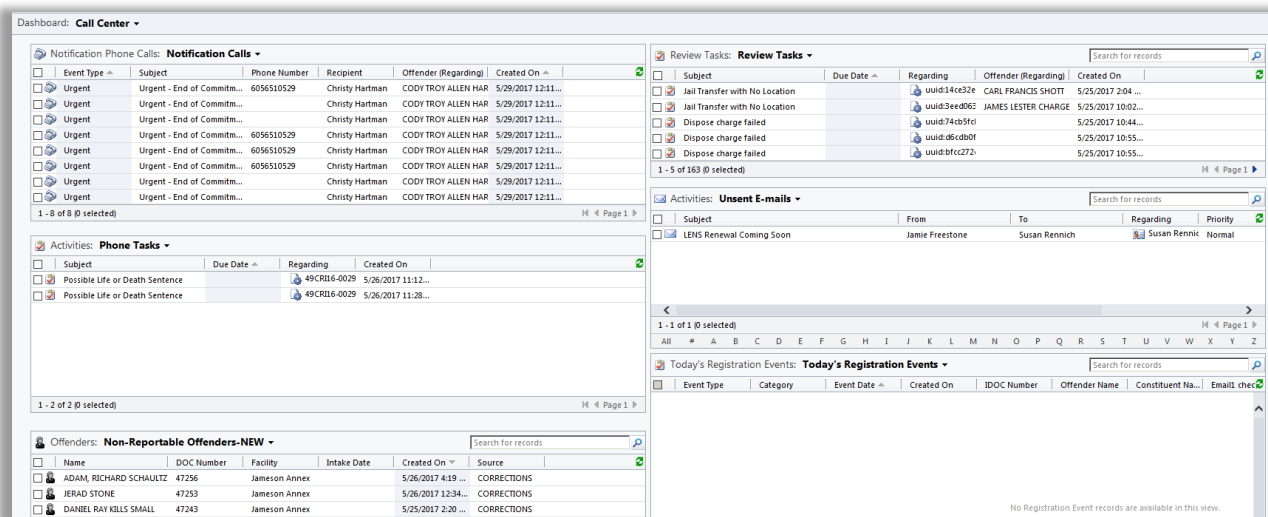


Chart Panel

Dashboards

Users can build a personal dashboard using personal and system views and personal and system charts. They also can use custom JavaScript and html in the dashboard, but most users will likely not have the skills to do so. The personal dashboard can provide a wide range of ad hoc reporting capability. The following are screens of dashboards: one with primarily list data and one with a set of charts.



List Oriented Dashboard*Chart Oriented Dashboard**Report Wizard*

The Report Wizard provides a more detailed report building capability. Report Wizard reports can join data from two related entities. Filters can be set that have essentially the same filtering capability as Advanced Finds, but that can be modified at run time. The report can be formatted to allow multiple-level grouping and sorting and will support features like sums and totals. The Report Wizard also provides an ability to include a chart as well as report table. Using the Report Wizard, the user can specify if the Report should be available from the Report Center, from the primary entity list view, or from the primary entity form, and determine from where they can be run. Report Wizard reports are run from SQL Server Reporting Service (SSRS). The following screen show the starting point for the Report Wizard.

Report: New Report - Microsoft Dynamics 365 - Google Chrome

tdcj-ivss.crm9.dynamics.com/crmreports/reportproperty.aspx

File Save and Close Help

Report: New Report Working on solution: Default Solution

General Administration

Source

*Report Type Report Wizard Report

Click Report Wizard to create or modify the report.

Report Wizard

Details

*Name

Description

Parent Report

Parent Report

Categorization

Categories Notification Reports

Related Record Types

Display In Reports area

Languages English

Status: New

Report Wizard Initialization

Other Reporting

By using Dynamics 365, CVAD staff will have the ability to export data to Power BI in the Microsoft Cloud for advanced data visualizations. Details on PowerBI can be found on the Microsoft site: <https://powerbi.microsoft.com/en-us/>.

1.13 Statistics

Requirement:

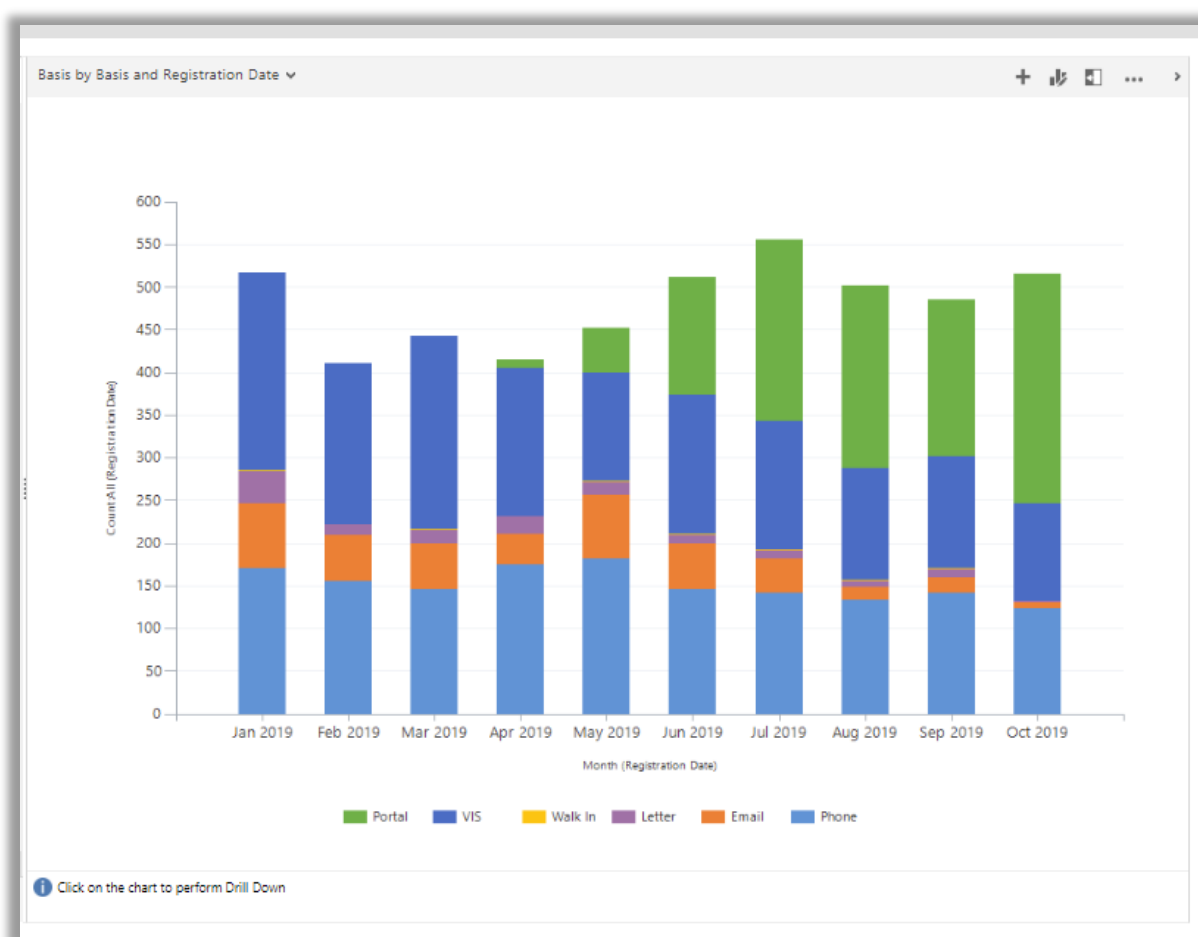
Provide the ability within the system for the CVAD to track statistics for usage of the system including number of registrations by type (phone, website, etc.) notifications by time (text, phone, email), failed notifications and registration cancellations broken down by Site and any other useful statistics.

Response:

All the cited statistics can be tracked and reported using SAVIN360. Out-of-the-box, the solution tracks method of registration, notification time, and notification results. Cancellations are called deactivations in SAVIN360. The exact date and time that deactivation occurred is recorded as is the user that deactivated the record. If any needed data are not currently collected for SAVIN360 operations, we can quickly add data fields to the appropriate Entity (the term Dynamics 365 uses for what is essentially a database table) and determine the best way to populate these fields.

Most statistics, and many others, can be generated using the Advanced Find tool discussed in our response by building a query using date-based filters like “Last X Days” and or non-specific date filtering and saving as a view. When run again, it will display the most current information. Also, a large date range can be used to capture a large data set, that can be exported into Excel for analysis through formulae and pivot tables. Or users could build a chart to show the data.

In less than 10 minutes the following chart and accompanying data view was created. This shows the trend of registration types by month.



Ad Hoc Chart to Show Registration Trends

In less than 5 minutes, the data view was exported to Excel and the following pivot table was built.

Count by Registration Date	Type							
Month of 2019	Email	Letter	Phone	Portal	VIS	Walk In	Grand Total	
+ Jan		76	36	171	232	2	517	
+ Feb		54	12	155	190		411	
+ Mar		55	15	145	226	1	442	
+ Apr		36	20	175	10	174	415	
+ May		75	15	181	53	127	452	
+ Jun		53	11	146	138	163	512	
+ Jul		39	10	142	212	151	555	
+ Aug		16	6	133	213	131	501	
+ Sep		18	9	142	184	130	485	
+ Oct		6	2	124	270	114	516	
Grand Total		428	136	1514	1080	1638	4806	

Pivot Table showing Count of Registration Type by Month of 2019

2. Support for Accessibility and Localization

Each proposal shall demonstrate how the Respondent's proposed Statewide Victim Information and Notification System will do the following:

2.1 ADA Compliance

Requirement:

Comply with the Americans with Disabilities ACT (ADA) including, but not limited to providing access to individuals who are deaf, hard of hearing, blind or partially sighted.

Response:

InfoStrat will comply with this requirement; since this is Microsoft technology, we rely on Microsoft to meet this requirement. The following is from Microsoft regarding accessibility.

Microsoft has a long-standing commitment to building products and solutions that enable people of all ages and abilities to interact with platform tools and services on a common ground. Microsoft demonstrates this continued commitment by offering detailed VPATs for many of its cloud core services, describing the accessibility features of those services. Because the Microsoft Cloud comprises many services, individual VPATs are provided for specific components and capabilities. Section 508 VPATS are posted on <https://www.microsoft.com/en-us/trustcenter/Compliance/Section-508-VPAT> which detail compliance of the products proposed including Dynamics CRM Online Government.

InfoStrat will work with Iowa technical staff to use Iowa's style sheets and technical specifications to ensure the portal meets ADA requirements and has an Iowa look and feel.

We expect the state will conduct compliance reviews prior to implementation and we will conduct internal reviews prior.

2.2 Additional Language Support

Requirement:

Provide system access and support services in languages other than English.

Response:

InfoStrat will comply with this requirement; below is a description of our approach to meeting the requirement.

For inbound calls, our Call Center has both English and Spanish speakers and uses a third-party translation service for other languages (in this case, Bosnian and Somali). Translation services are included in the monthly operations costs.

For notification messages, all message text is configured for the Event Type in a set of child records called Messages. The following screen shows the Messages records for an Event Type.

Event Type	Category (Eve...	Language	Phon...	Robo...	Email...	Lette...	SMS	TTY
Discharge	Urgent	English	No	No	Yes	No	No	No
Discharge	Urgent	English	No	Yes	No	No	No	No
Discharge	Urgent	English	No	No	No	Yes	No	No
Discharge	Urgent	Spanish	No	No	No	Yes	No	No
Discharge	Urgent	Spanish	No	No	Yes	No	No	No
Discharge	Urgent	Spanish	No	Yes	No	No	No	No

Event Type Message List

All notification text is written into the Message record, which provides users with enough permissions the ability to write or edit the message for the Event Type, define the delivery methods (phone, email, letter, text, other) to which the message applies, and define the language for which it is used. SAVIN360 also provides a range of dynamic values that can be inserted into the text to pull actual values from the details of the Event, Offender, Facility, or other records involved in the notification. The following screen shows configuration of a message; dynamic values are shown in curly braces, (e.g., {Event Date Short}).

MESSAGE : SAVIN
Discharge - English

Name*
Discharge - English

General

Media

Event Type*	Discharge		
Phone	No	SMS	No
Email	Yes	TTY	No
Letter	No	Robo-Call	No

Message

Language* English

Message

This is to notify you that this offender has completed the entire sentence required by law and was released from custody from (Facility Name) in (Facility City), (Facility State) on (Event Date Short). The offender will not be on supervision, meaning TDCJ will have no jurisdiction over the offender and the Parole Board cannot impose special conditions.

(Detainer List English)

<SV: SEX_OFFENDER_ENGLISH>

<SV: SAFETY_MESSAGE_ENGLISH>

Should the offender be returned to the custody of TDCJ under a new sentence, you will be notified of such and will continue to be notified of any subsequent activities.

Message Definition Screen

The following screen shows an Email message configured for Spanish.

MESSAGE : SAVIN
Discharge - Spanish

Name*
Discharge - Spanish

General

Media

Event Type*	Discharge		
Phone	No	SMS	No
Email	Yes	TTY	No
Letter	No	Robo-Call	No

Message

Language* Spanish

Message

La presente comunicación es para notificarle que el ofensor ha cumplido la condena completa requerida por ley y fue liberado de la custodia de (Facility Name) en (Facility City), (Facility State) el (Event Date Short). El ofensor no estará en supervisión; lo cual implica que el TDCJ no tendrá jurisdicción sobre el ofensor y la Junta de Libertad Condicional no puede imponer condiciones especiales.

(Detainer List Spanish)

<SV: SEX_OFFENDER_SPANISH>

<SV: SAFETY_MESSAGE_SPANISH>

Message Definition Screen for Spanish Email

The list of dynamic values is maintained in a Knowledge Base article to allow permitted staff to look at the list of available dynamic data values.

Dynamic Data

KBA-01000-B2L3V1

Purpose & Scope

The Notify Rules entity can be used to set up the Event Types to be used for notification and the text to use for such notifications. To allow for the use of dynamic text, based on the data available for notification, the following fields can be inserted into the text and will be populated from CRM when notification is actually created. Make sure you keep the curly braces when you add a field to the text.

Procedure

Dynamic Field Name	CRM Field Name (Registration Event)
{Offender Name}	Offender Name
{Language}	Language
{Constituent Name}	Constituent Name
{DOC Phone}	DOC Phone Number
{DOC Number}	IDOC Number
{Facility Name}	Facility Name
{Facility City}	Facility City
{Facility Phone Number}	Previous Facility Phone Number
{Facility New Location}	New Facility

Dynamic Data Knowledge Base Article

For messages in other languages, InfoStrat will update the language option set to include the additional languages. The following screen shows the language selection picklist as part of the Messages configuration form.

The screenshot shows a web form titled "Message". At the top, there is a "Language" picklist with a red asterisk indicating it is required. The picklist is open, showing a scrollable list of languages: English (highlighted), Spanish, French, Russian, and Tagalog. Below the picklist, the "Message" text area contains the following content:

(Detainer List English)

<SV: SEX_OFFENDER_ENGLISH>

<SV: SAFETY_MESSAGE_ENGLISH>

Should the offender be returned to the custody of TDCJ under a new sentence, you will be notified of such and will continue to be notified of any subsequent activities.

At the bottom, there is a "Name" field with the text "Discharge - English" partially visible.

Message Form Language Selection

For the languages cited—Spanish, Bosnian and Somali—notification text will be built using the Latin alphabets. Bosnian and Somali can be written with Latin alphabets. In the case of Somali, the Latin alphabet is currently the official alphabet for written Somali (<https://www.omniglot.com/writing/somali.htm>). Dynamics 365 can support other alphabets, including Cyrillic and Arabic script variants associated with the original Bosnian and Somali

languages. If these alphabets are desired for written notifications, additional cost will be required and will be addressed in contract negotiations.

The SAVIN360 portal also will provide a language widget allowing selection of the desired language. Originally, the SAVIN360 portal used the Bing Translator widget, but this has been deprecated by Microsoft; Google is deprecating the Google Translate service as well. InfoStrat is currently investigating other tools for this purpose and will complete research by the time the contract is awarded.

3. Device Requirements

Requirement:

Victims and survivors must have access to all features regardless of device access (i.e. smart phone, smart watch, tablet, computer).

Response:

InfoStrat will comply with this requirement; below is a description of our approach to meeting the requirement.

The SAVIN360 Portal provides a device responsive presentation of information in which all features are accessible to any web enabled device. The portal is public facing, allowing any web user to access the site and public information without logging in. The portal will use responsive design, which renders the pages appropriately for each device. All portal features will be available and supported by major browsers that adhere with current HTML standards.

Dynamics 365 also has responsive design, so CVAD users will be able to access all features from any web-enabled device. In addition, Microsoft provides a mobile application for Dynamics 365 for Apple and Android devices, available from the Apple Store and Google Play.

4. Application Programming Interfaces

Requirement:

The Statewide Victim Information and Notification System will allow for capabilities of web service or API with third-party systems.

Response:

InfoStrat will comply with this requirement; below is a description of our approach to meeting the requirement.

Dynamics 365 provides a web service enabled API that can be configured for access by either SOAP or REST web services. InfoStrat already has implemented multiple web services including a JMS web service that can be used for providing custody status data, alias data, personal marks data, and photos. In addition, InfoStrat has implemented the IJIS Standard/SAVIN IEPD, NIEM conformant web service with coverage for Court, Prosecution, Law Enforcement, Corrections and Jail Notification Categories. InfoStrat has extended the SAVIN IEPD for Jail activities to receive charge data from the jail at the time of booking. For Indiana, InfoStrat also implemented a NIEM conformant web service for receipt of abstracts of judgment from the Court system.

Dynamics 365 provides has a software development kit (SDK) that enables development of interfaces for specific applications to consume.

5. Quick Exit

Requirement:

The Statewide Victim Information and Notification System must include the ability for victims and survivors to exit quickly the application via a “quick escape” function.

Response:

InfoStrat will comply with this requirement; below is a description of our approach to meeting the requirement.

While this feature does not currently exist on the SAVIN360 portal, we have researched various options and have included implementation of this feature set as described below, as part of the overall level of effort.

The Quick Escape feature will be available in the header area of the portal, which will be accessible from every page. The InfoStrat implementation will use a different approach for the anonymous users and logged in users. A default page that is configurable by Victim Services staff will be used for anonymous users and users who have not established a personal Quick Escape page. The Quick Escape button will automatically redirect to this default page.

InfoStrat also will provide a means by which logged in users can set their own Quick Escape page, so that the page will change to one specified by the user. This way, if the default page is not one that the person would normally go to, the user can select a page that would be more representative of their interests. For example, if CVAD chose the MSN news site as the default, a particularly user who does not frequent that site could set something else (maybe Runner’s World) as their Quick Escape site. As part of this configuration, the user can also preselect multiple pages under the main site as part of their history. Whenever the user logs in, these pages will be cached to ensure quick opening when needed.

Additionally, in our research, we have determined that we can also configure to clear the Iowa SAVIN360 Portal domain entries from the browser history for most browsers. This way, the browser back button doesn’t take the user back into Iowa Portal after accessing the Escape.

6. Nationwide Search

Requirement:

The Statewide Victim Information and Notification System must allow victims and survivors to perform a nationwide search of offenders of the states participating on the platform.

Response:

InfoStrat can comply with this requirement but is constrained by the fact that for all SAVIN360 implementations, we do not own or hold the data and cannot provide access to another state’s data without the written permission of that state. InfoStrat has discussed this option with other states that use SAVIN360 and they are amenable to such a solution.

Nevertheless, to build this feature, it would require a memorandum of understanding or other agreement between Iowa and each state that uses SAVIN360 as to what data could be shared.

InfoStrat could then build an interface for each to enable access agreed upon data from each other's' implementation. As the cost of this cannot be determined prior to such discussions, this data exchange will be out of scope but we can look for a change order after go live that could conceivably include a cost sharing agreement with the other states to share data with each other.

For this implementation, we will provide a means whereby from the portal users can open in a new browser tab or window a link to each state site, to allow searching in other states.

7. View All Registrations

The Statewide Victim Information and Notification System must allow victims and survivors to view all available registrations and registration types based on person. This includes the following

Response:

InfoStrat will comply with this requirement; in each subsection below is a description of our approach to meeting the requirement.

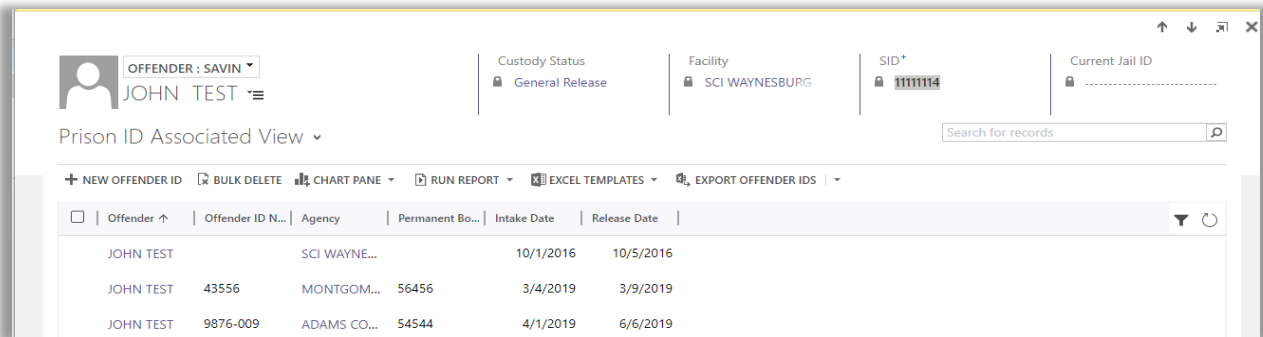
7.1 All Offender IDs

Requirement:

Various offender records – incarceration, probation and parole – will be linked to maximize search results for victims and survivors.

Response:

Offender searches can be conducted across multiple types of IDs. Each offender record will be searchable by Offender data as well as ID date. This list of Offender IDs can be found on the offender record. The following screen displays the



Offender	Offender ID N...	Agency	Permanent Bo...	Intake Date	Release Date
JOHN TEST		SCI WAYNE...		10/1/2016	10/5/2016
JOHN TEST	43556	MONTGOM...	56456	3/4/2019	3/9/2019
JOHN TEST	9876-009	ADAMS CO...	54544	4/1/2019	6/6/2019

Offender ID List in Dynamics 365

And, in the portal, any of these IDs, no matter how far in the past, can be used to search for the offender. This is depicted in the screen below in which the Offender ID was from a county facility from March of the current year.

Offender Search

*When searching for an offender you may either search by Offender Name or Offender ID.

*You may search by partial Offender Name or ID number. For example, searching for 'am' should return results for an offender named James or Amber.

43556

Offender	Age	Gender	Race	Custody Status	Current Facility	Offender ID
JOHN TEST	19	Male	Asian	Out of Custody	SCI WAYNESBURG	43556

Offender ID Search on Portal

Viewing the details of the Offender allows for display of all IDs used. This feature is available to all users, including anonymous users.

Offender Details

Name	Custody Status	Race	Height
JOHN TEST	Out of Custody	Asian	4ft 00in
Current Facility ID	Facility	Sex	Weight
—	SCI WAYNESBURG	Male	—
DOC Number	Release Date	Hair Color	
OY6631	10/5/2016	BRO	
Parole Board Number		Eye Color	
MS0158		BRO	
Offender IDs			
Agency	Offender ID Number ↑	Intake Date	Release Date
SCI WAYNESBURG		10/1/2016	10/5/2016
MONTGOMERY COUNTY PRISON	43556	3/4/2019	3/9/2019
ADAMS COUNTY CORRECTION	9876-009	4/1/2019	6/6/2019

Offender Details on Portal Shows All IDs

7.2 Register Once

Requirement:

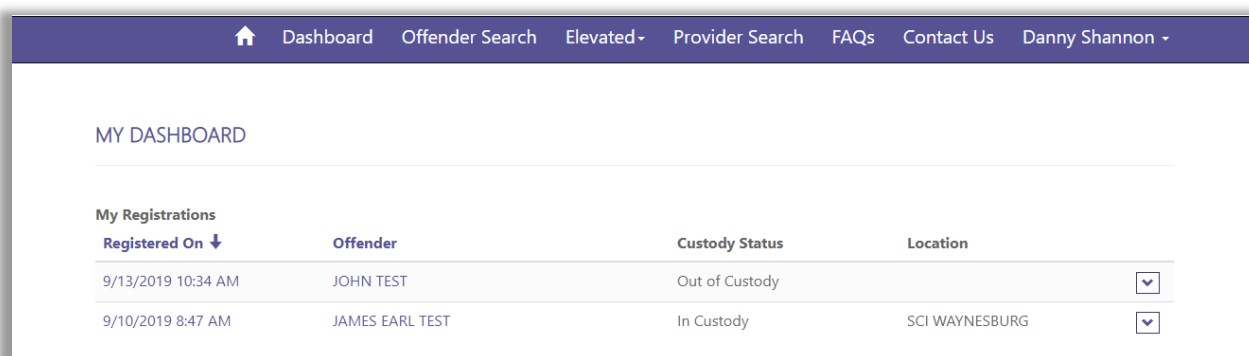
Victims and survivors can register once to receive notifications on a specific offender regardless of movement through the criminal justice system.

Response:

InfoStrat will comply with this requirement; below is a description of our approach to meeting the requirement.

This is a standard feature of SAVIN360. Please see our response to requirement 1.8 for details.

In the SAVIN360 Portal, logged in users can view all the offenders that they have registered for with current custody status and location information from the dashboard. The user can drill into the details to see all information about the offender.



The screenshot shows the SAVIN360 Portal Dashboard. At the top is a navigation bar with links: Home, Dashboard, Offender Search, Elevated+, Provider Search, FAQs, Contact Us, and a user profile for Danny Shannon. Below the navigation bar is the 'MY DASHBOARD' section. It contains a table titled 'My Registrations' with columns: Registered On, Offender, Custody Status, and Location. There are two rows of data. The first row shows a registration on 9/13/2019 at 10:34 AM for 'JOHN TEST' who is 'Out of Custody'. The second row shows a registration on 9/10/2019 at 8:47 AM for 'JAMES EARL TEST' who is 'In Custody' at 'SCI WAYNESBURG'. Each row has a dropdown arrow on the right side.

Registered On ↓	Offender	Custody Status	Location
9/13/2019 10:34 AM	JOHN TEST	Out of Custody	
9/10/2019 8:47 AM	JAMES EARL TEST	In Custody	SCI WAYNESBURG

Portal Dashboard

8. Anonymous Search

Victims, survivors, criminal justice professionals and members of the general public must have the ability to access the offender search and register for notification as an anonymous guest.

8.1 Registrant Identification

Requirement:

Registrants will not need to provide their names, addresses or types of crimes associated with the registration requests.

Response:

InfoStrat will comply with this requirement; please see our response to requirement 1.3 for a description of our approach to meeting the requirement.

9. Admin Portal

CVAD and its designees will have 24/7 access to a password protected private portal used for the following:

Response:

InfoStrat will comply with this requirement; in each subsection below is a description of our approach to meeting the requirement.

9.1. Notification Visibility

Requirement:

Ability to review all notifications that were delivered to victims and survivors.

Response:

The Admin Portal is implemented in Dynamics 365, which is a licensed product by Microsoft and managed using Active Directory. Users must be defined in Office 365 and will require a login. Licensed users also will be able to access the SAVIN360 portal from locations outside the state network.

The Admin portal places the entire suite of features and administrative capabilities of SAVIN360 at the disposal of licensed users, based on a role-based security model. As part of this portal, users with sufficient permissions will be able to view all notifications that have taken place at any time. On the main screen of the Admin portal, the user will be provided a link to Notifications.

Event Type	Constituent	Offender	S...	D...	Category	E...	E...	L...	L...	P...	P...	S...	S...	T...	T...	Event Date
Parole Release	Legacy 90000...	RYAN THOM...	No	No	No	No	Yes	No	No	No	No	No	No	No	No	
Parole Release	Legacy 90000...	KURT EDWAR...	Yes	No	No	No	No	No	No	No	No	No	No	No	No	
Parole Release	Legacy 90000...	BREANNA RH...	No	No	No	No	Yes	No	No	No	No	No	No	No	No	
Parole Release	PBPP Registra...	BREANNA RH...	No	No	No	No	Yes	No	No	No	No	No	No	No	No	
Parole Release	Heather Hiest...	LASHAWN S...	Yes	No	No	No	Yes	No	No	No	No	No	No	No	No	
Out to Court	OVA:9929325	DUSTIN WAY...	No	No	No	No	Yes	No	No	No	No	No	No	No	No	10/7/2019 5...
Return to Cus...	OVA:9930921	SHAIQUAN C...	Yes	No	No	Yes	Yes	No	No	No	No	No	No	No	No	10/5/2019 1...

List of Notifications

This will provide a listing of all notifications. However, data views can be added to see other notifications, including today's notification, those from this week or last week, month, quarter, year, etc. The following screen shows View selection; any number of Views can be added at CVAD request.

System Views	S...	D...	Category	E...	E...	L...	L...	P...	P...	S...	S...	T...	T...	Event Date
Active Notifications	No	No	No	No	Yes	No	No	No	No	No	No	No	No	
Inactive Notifications	Yes	No	No	No	No	No	No	No	No	No	No	No	No	
My Recent Notifications	No	No	No	No	Yes	No	No	No	No	No	No	No	No	
Notifications Alert Report	No	No	No	No	Yes	No	No	No	No	No	No	No	No	
Notifications Stopped for Event	Yes	No	No	No	Yes	No	No	No	No	No	No	No	No	
Notifications Stopped for Sender	No	No	No	No	Yes	No	No	No	No	No	No	No	No	
Notifications This Month	Yes	No	No	No	Yes	No	No	No	No	No	No	No	No	
Notifications This Week	No	No	No	No	Yes	No	No	No	No	No	No	No	No	10/7/2019 5...
Portal - My Offender Notifications	Yes	No	No	Yes	Yes	No	No	No	No	No	No	No	No	10/5/2019 1...
Print Notification Letters														
Recent Notifications														

Notification Data Views List

Any of the listed records can be opened and the actual text of the notification for each delivery method can be reviewed. In the screen below, in the interest of space, the text for the Email is displayed. A user with appropriate permissions can also view text and phone notification text.

NOTIFICATION : ADMIN ▾
Notify Parole Release Legacy 90000037: K...

Constituent: Legacy 90000037 | Offender: KURT EDWARD WOLF | Event Type: Parole Release | Stop Notifications: No

Email Text

This e-mail is sent from the SAVIN program.

You have registered to receive notifications on the following offender: KURT EDWARD WOLF.

This is to notify you that the offender has been released to parole from SCI PHOENIX in , Pennsylvania. If you have any concerns about your immediate safety, please contact your local law enforcement agency or, if you have an emergency, call 911. For more information, please contact the Department of Corrections at 605-367-5140.

If you have questions or would like to remove yourself from future notifications, please contact the Sheriff:

SAVIN Call Center: 800-900-8900.
SAVIN General Email: savin@state.gov

Please visit our website at http://[url here] to update your account or to update your registration information. By providing up-to-date email addresses and phone numbers, we will be able to provide you with more timely notifications. If you need assistance or would like to be removed from our notification list, please contact the SAVIN Call Center at ..

All telephone and e-mail registrations provided through SAVIN are kept completely confidential.

Please do not reply to this e-mail.

For more information, contact your County Victim/Witness Advocate at 303-404-5566

Notification Form with Text

The record also displays a listing the actual methods used to attempt to notify the registrant, based on the registrant's selections. The follow screen shows a sample listing; This listing is also used to capture results and provide notification failover.

NOTIFICATION : ADMIN ▾
Notify Parole Release Legacy 90000037: K...

Constituent: Legacy 90000037 | Offender: KURT EDWARD WOLF | Event Type: Parole Release | Stop Notifications: No

Notification Tracker Associated View ▾

+ NEW NOTIFICATION TRA... | ADD EXISTING NOTIFICA... | BULK DELETE | CHART PANE ▾ | RUN REPORT ▾ | EXCEL TEMPLATES ▾ | EXPORT NOTIFICATION T... ▾

<input type="checkbox"/>	Event Type	Type	Contact	Offender (Noti...)	SID (...)	DOC ...	Category	Requ...	Sent	Sent Date...	Retur...	Returned ...	Call Status	Confi...	Conf	🔍	🔄
	Parole Release	Email	Legacy 900...	KURT EDW...			Urgent	Yes	No		No			No			

Notification Tracking by Method

The solution also provides a data audit, so that any changed data values can be researched and retained for future use, if needed.

NOTIFICATION : ADMIN ▾

Notify Parole Release Legacy 90000037: K...

Constituent Legacy 90000037	Offender BETO WOLF	Event Type* Parole Release	Stop Notifications No
--------------------------------	-----------------------	-------------------------------	--------------------------

Audit History

Filter on: All Fields ▾

DELETE CHANGE HISTORY

Changed Date	Changed By	Event	Changed Field	Old Value	New Value
10/20/2019 1:05...	H. Jamison	Update	Start Notification ...		10/20/2019 1:05 PM
10/20/2019 1:05...	H. Jamison	Update	Email Requested	No	Yes
10/20/2019 1:05...	H. Jamison	Create	Apology Email		No
			Backdated Date		10/18/2019 5:05 PM
			Constituent		Legacy 90000037
			Constituent Name		Legacy 90000037
			DOC Number		
			Email Requested		No
			Email Success		No
			Email Text		This e-mail is sent from...
			Email2 check		No
			Event Name		Parole Release
			Event Type		Parole Release
			Facility BW Type		

Registrant Audit History

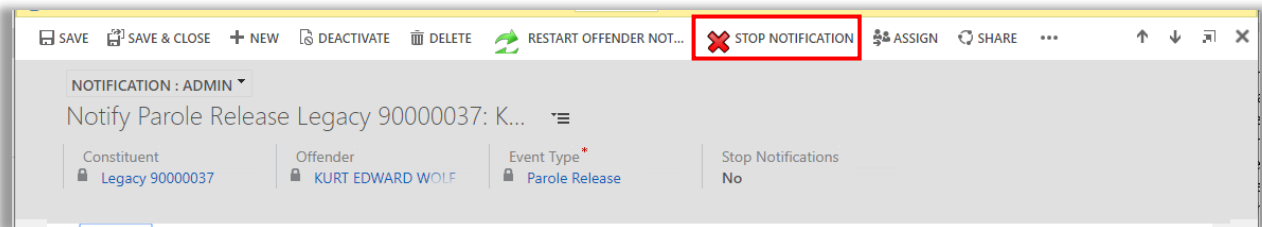
9.2. Call Stop

Requirement:

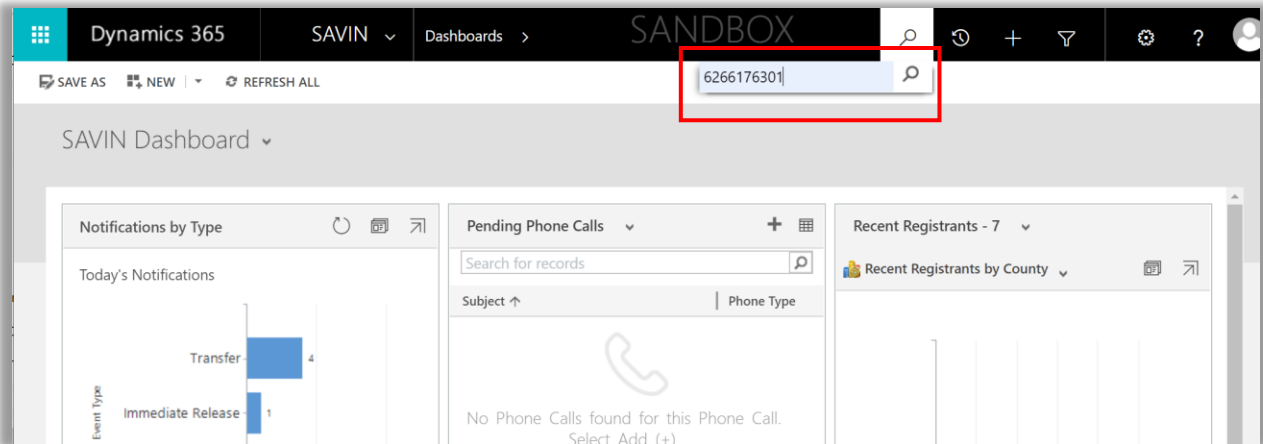
Stop current notification calls.

Response:

SAVIN360 provides a method for stopping all phone calls for a notification from the Notification form. In the command ribbon, the Stop Notification button can be used to do this.

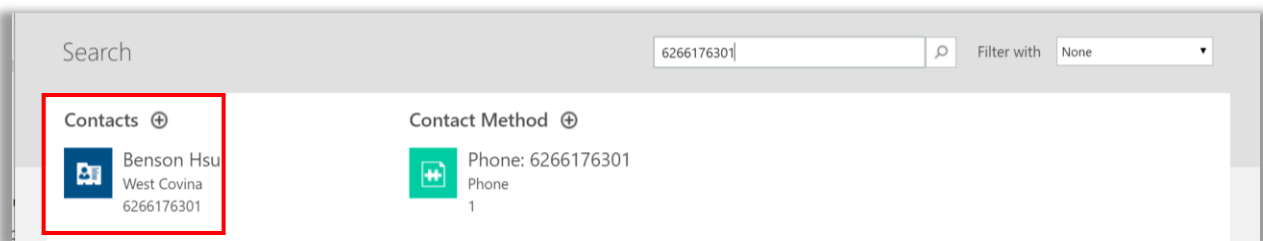
*Stop Notification Button on Notification Form*

A user with appropriate permissions can find the Notification using a Global Search feature.



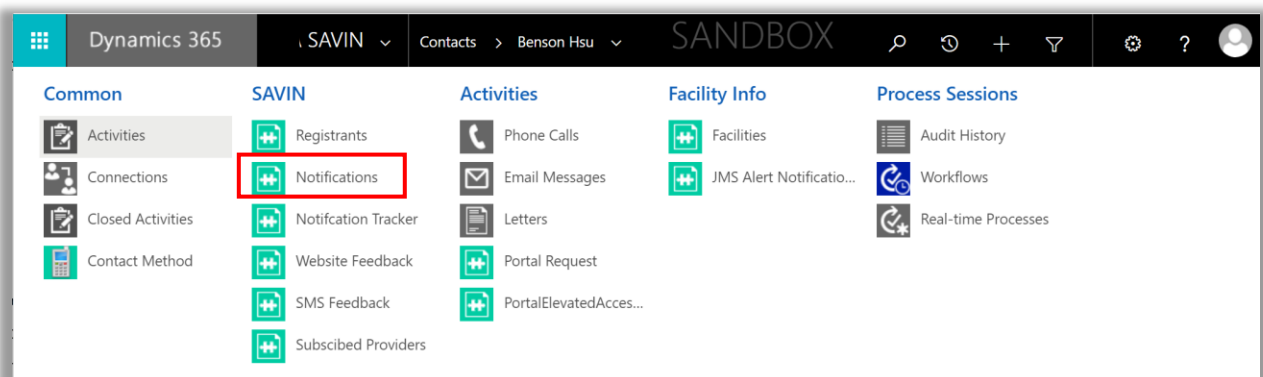
Global Search for Phone Number

Upon conducting the Search, a list of all the records that contain the search value will be provided. In the screen below, searching the phone number results in the Contact record and the Contact Method.



Global Search Results

You can then open the Contact from this screen and then look at the related records to find the Notifications that have been provided to the person.



Find Notifications for the Contact

When selecting Notifications, the list of Notifications for that person appears. The list sorts such that the most recent notification is at the top of the list. Opening the Notification will then give access to the form on which the Stop Notification is found.

CONTACT : SAVIN

Benson Hsu

Full Name

Benson Hsu

PIN

0123

Last Notification Time

10/23/2019 5:18 PM

Notification Associated View

Search for records

+ NEW NOTIFICATION

ADD EXISTING NOTIFICA...

BULK DELETE

CHART PANE

RUN REPORT

EXCEL TEMPLATES

EXPORT NOTIFICATIONS

<input type="checkbox"/>	Event Type	Constituent	Offender	SID	DOC ...	Category	Email...	Email...	Lette...	Lette...	Phon...	Phon...	SMS ...	SMS ...	TTY ...	
	In Custody in N...	Benson Hsu	Amanda Ro...				Yes	No	No		Yes		Yes	Yes	No	No
	Escape	Benson Hsu	BART A SIM...				Yes	No	No		No		Yes	Yes	No	No
	Escape	Benson Hsu	Homer Sim...				Yes	No	No		No		Yes	Yes	No	No
	Escape	Benson Hsu	Homer Sim...				Yes	No	No		No		Yes	Yes	No	No
	Escape	Benson Hsu	BART A SIM...				Yes	No	No		No		Yes	Yes	No	No
	Escape	Benson Hsu	BART A SIM...				Yes	No	No		No		Yes	Yes	No	No
	Escape	Benson Hsu	BART A SIM...				Yes	No	No		No		Yes	Yes	No	No

Notification List for Contact

9.3. Clear Contact Data

Requirement:

Delete phone numbers and updating registrations.

Response:

SAVIN360 manages contact information at multiple levels. Our data model involves maintaining some data on a person record, called the Contact. Each contact method—email, phone number, mailing address—is attached as a related record to the Contact. To clear the contact data, the user can search on the data, open the Contact and view the related Contact Methods. The screen below shows the Contact record with the related Contact Methods.

CONTACT : SAVIN

Benson Hsu

Full Name

Benson Hsu

PIN

0123

Last Notification Time

10/23/2019 5:18 PM

Contact Method Associated View

Search for records

+ NEW CONTACT METHOD

EDIT

ACTIVATE

DEACTIVATE

DELETE CONTACT METH...

BULK DELETE

SEND DIRECT EMAIL

ASSIGN CONTACT METH...

SHARE

...

<input type="checkbox"/>	Name	Method	Type	Invali	Email Address	Phone Numbe	Phon	Account	City	State	Constituent	Modified On	
<input checked="" type="checkbox"/>	Address: West Covi...	Address	1	No					West Covina	CA	Benson Hsu	10/16/2018...	
	Email: hsumania@g...	Email	1	No	hsumania@gmail.co...						Benson Hsu	10/16/2018 ...	
	Phone: 6266176301	Phone	1	No		6266176301	Mo...				Benson Hsu	10/16/2018 ...	
	Phone: 6269642838	Phone	2	No		6269642838	Lan...				Benson Hsu	10/16/2018 ...	

Registrant's Contact Methods

From this screen you can select a method and deactivate or delete; deactivation will archive the record so any history associated with that record will remain intact, if you delete the Contact Method the history is lost.

You also can open a Contact Method and mark it Invalid. If marking them Invalid, the data point will show up in the user's portal profile as not valid and allow the user to clear, update or reassert

the value. While a Contact Method is marked Invalid, it will not be used for notification. The screen below shows the Contact Method form for Emails; marking the Invalid field Yes makes the Contact Method invalid.

The screenshot shows the Dynamics 365 interface for editing a contact method. At the top, a header bar displays 'CONTACT METHOD : ADMIN' and the email 'Email: danny@infostrat.com'. Below this, a summary bar shows 'Constituent: Danny Shannon', 'Method: Email', and 'Invalid: No'. The main form area is titled 'General' and contains several fields: 'Constituent' (Danny Shannon), 'Method' (Email), 'Invalid' (No, highlighted with a red box), 'Type Number' (1), 'Email Address' (danny@infostrat.com), 'IM Type' (empty), 'Source' (empty), 'Name' (Email: danny@infostrat.com), and 'Owner' (Danny Shannon).

Contact Method Form in Dynamics 365

Contact methods can be easily added as well. Clicking the New Contact Method from the screen above opens the Quick Create for Contact Methods. This allows you to add a new Contact Method to the Registrant. When a Method is selected, the form will change to show only the fields needed for the method.

The screenshot shows the 'Quick Create: Contact Method' form in Dynamics 365. The form is titled 'Quick Create: Contact Method' and has a close button. It is divided into three main sections: 'Constituent' (Benson Hsu), 'Method' (a dropdown menu with options: Phone, Email, SMS, TTY, Address, Mobile), and 'Address Type' (US). The 'Method' dropdown is currently set to 'Email'. Below the dropdown, there are fields for 'Email Address', 'Phone Number', 'Phone Type', and 'Account'. To the right of these fields, there are fields for 'Street 1', 'Street 2', 'City', 'State', 'Zip', and 'Formatted Address'. At the bottom right, there are 'Save' and 'Cancel' buttons.

Contact Method Quick Create Form in Dynamics 365

9.4. Reports

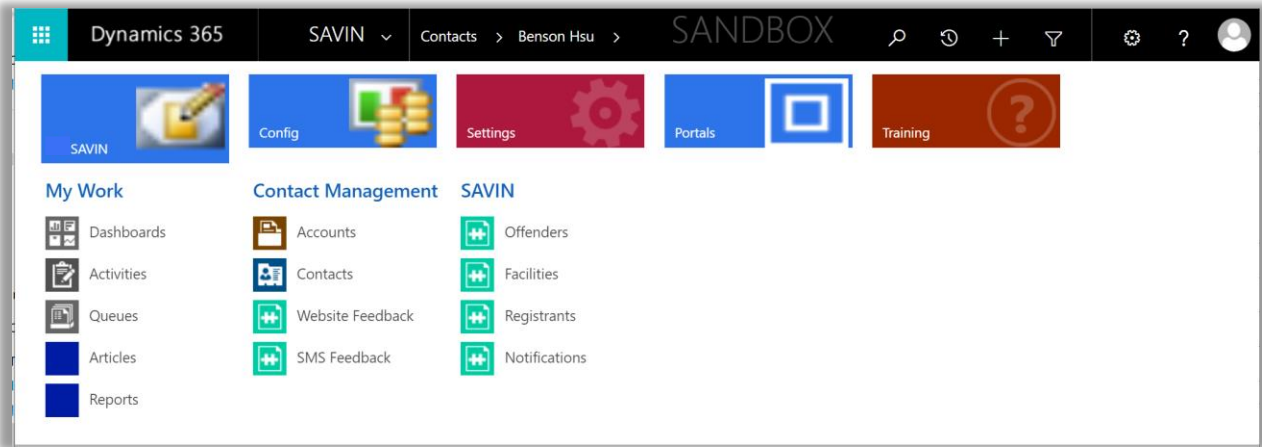
Requirement:

Provide reports based on any and all data fields captured by the system.

Response:

SAVIN360 provides several reports including: Registration Details, Unused Portal Accounts, Notification Summary, Undeliverable Report, Notification Trends, Jail Summary, Integrated Jail Daily Report, and more. InfoStrat anticipates that CVAD will require several custom reports, as well.

Dynamics 365 provides a Report Center in the SAVIN360 work area, as shown in the screen below.



SAVIN360 Report Center

Opening the Report Center provides a listing of available reports. Reports can be categorized to display in specific groupings.

<input type="checkbox"/>	Name ↑	Report Type	Modified On	Description
<input type="checkbox"/>	» _mgm	Reporting Ser...	9/24/2019 2:...	
<input type="checkbox"/>	» Benson Test	Reporting Ser...	4/8/2019 5:5...	
<input type="checkbox"/>	» Benson Test Supporting Data	Reporting Ser...	4/8/2019 5:5...	
<input type="checkbox"/>	» County With Assigned VAC	Reporting Ser...	3/25/2019 4:...	A list of all counties, showing t...
<input type="checkbox"/>	» Notification Statistics	Reporting Ser...	8/7/2019 2:3...	Daily, Weekly, or Monthly coun...
<input type="checkbox"/>	» OVAG Direct Service Outcome	Reporting Ser...	6/26/2019 10...	
<input type="checkbox"/>	» Rejected Invalid Data Report	Reporting Ser...	3/25/2019 4:...	Listing of Contact Methods ma...
<input type="checkbox"/>	» Undeliverable Report	Reporting Ser...	1/20/2019 2:...	Report of Undeliverable Email
<input type="checkbox"/>	» Victim Registrations Totals by Year	Reporting Ser...	3/29/2019 8:...	
<input type="checkbox"/>	» VOCA Crime Type	Reporting Ser...	3/26/2019 9:...	
<input type="checkbox"/>	» VOCA Crime Type By Quarter	Reporting Ser...	3/26/2019 11...	
<input type="checkbox"/>	» VOCA Crime Type Supporting Data	Reporting Ser...	3/26/2019 9:...	
<input type="checkbox"/>	» VOCA Demographics	Reporting Ser...	3/26/2019 9:...	
<input type="checkbox"/>	» VOCA Demographics By Quarter	Reporting Ser...	3/26/2019 11...	
<input type="checkbox"/>	» VOCA Demographics Supporting Data	Reporting Ser...	3/26/2019 10...	
<input type="checkbox"/>	» VOCA Services Provided	Reporting Ser...	10/15/2019 3:...	
<input type="checkbox"/>	» VOCA Services Provided By Quarter	Reporting Ser...	10/15/2019 2:...	
<input type="checkbox"/>	» VOCA Services Provided Supporting Data	Reporting Ser...	10/15/2019 8:...	Same report without multiple ...

Reports List

Selecting a report from the list will open the report. All reports in the Report Center run in SQL Server Reporting Services, which provides a client depicted in the screen below, which shows the Notification Statistics Report. Reports generated in the client can be exported to PDF, Word, Excel, XML and other formats.

Report Viewer: Notification Statistics - Google Chrome

tdcj-ivss.crm9.dynamics.com/crmreports/viewer/viewer.aspx?id=%7bAE4DE1E4-F5B5-E811-8127-1458D04E2F20%7d&h...

File Help

StartDate: 10/1/2019 End Date: 10/24/2019 View Report

Report By: Day Type: All

Basis: Sent

1 of 1 100% Find | Next

Notification Statistics

Summary By Day,
from 10/01/2019 to 10/24/2019,
for Notifications Sent

Period	Letter	Email	Robo	Phone	SMS
10/01/2019	858	557	43		99
10/02/2019	149	114	63		36
10/03/2019	168	131	38	3	33
10/04/2019	171	140	59		33
10/05/2019	46	39	11		18
10/06/2019	42	28			4
10/07/2019	202	129	57	6	43
10/08/2019	327	254	77		62
10/09/2019	180	133	45		35
10/10/2019	166	124	45		50
10/11/2019	156	103	56	1	33
10/12/2019	42	23	19		15
10/13/2019	44	21	3		9
10/14/2019	169	133	51		43
10/15/2019	290	214	56	8	62
10/16/2019	144	107	50	3	31
10/17/2019	170	124	49	1	34
10/18/2019	145	103	65		33
10/19/2019	229	144	7		34
10/20/2019	27	12	2		4
10/21/2019	142	103	53	6	23
10/22/2019	307	226	31	1	57
10/23/2019	101	79	44		38
	4,275	3,041	924	29	829

NotificationStatistics.rdl

Notification Statistics Report

Dynamics 365 also provides a wide range of Ad Hoc reporting features that were described in our response to requirement 1.12 Ad Hoc Reporting.

9.5. Analytical Reports

Requirement:

Provide analytics-based reporting on system usage, performance and outcomes.

Response:

InfoStrat will conduct requirements analysis to determine the specific reports needed by CVAD and will develop the reports needed that are not already available. Of the specifics listed in the answers to questions, we can confirm that the data needed already are captured by SAVIN360. For example, the source of registration is captured in a field on the Registrant record called Basis, which is a picklist; County of Offense is captured as part of the registration process; and the date/time at which the registration occurred also is captured. Additionally, there are calculated fields that automatically track the number of registrants an offender has and likewise, the number of offenders a particular registrant has registered for. All these data are available and can be included in reports, data views, charts, and so forth.

9.6. Undeliverable Notifications

Requirement:

Undeliverable notifications by telephone, email and text message must be tracked and recorded in a report based on user-identified timeframes.

Response:

SAVIN360 creates a Notification Tracker record for each method of notification provided by a registrant when a notification has been created. This Notification Tracker record contains all information as to whether the method was requested, whether the notification was sent via that method and whether it was returned, the status of a phone call if the method is phone, or any other outcome. The following screen shows a Notification Tracker record.

The screenshot displays a web application interface for a 'Notification Tracker'. At the top, there's a header bar with a dropdown menu set to 'SAVIN', a 'New Notification Tracker' button, and three data fields: 'Notification' (Notify Escape Benson Hsu: BART A SIMPSON), 'Contact Method' (Email: hsumania@gmail.com), and 'Sent Date' (8/14/2019 8:00 AM). Below this is a section titled 'Notification Tracker' containing a table with details: Contact (Benson Hsu), Notification (Notify Escape Benson Hsu: BART A SIMPSON), Category (Emergency), Contact Method (Email: hsumania@gmail.com), Event Type (Escape), and Requested (Yes). A 'Status' section follows, containing a table with fields: Type (Email), Sent (Yes), Returned (No), Confirmed (No), Call Status (empty), Sent Date (8/14/2019 8:00 AM with a calendar icon), Returned Date (empty), and Confirmation Time (empty).

Notification Tracker			
Contact	Benson Hsu	Contact Method	Email: hsumania@gmail.com
Notification	Notify Escape Benson Hsu: BART A SIMPSON	Event Type	Escape
Category	Emergency	Requested	Yes

Status			
Type	Email	Call Status	-----
Sent	Yes	Sent Date	8/14/2019 8:00 AM
Returned	No	Returned Date	-----
Confirmed	No	Confirmation Time	-----

Notification Tracker

Any Notification Tracker in which the Type is Email or Text and the Returned field is set to Yes is considered Undelivered. Any Notification Tracker in which the Type is Phone and the Call Status is Invalid Number or Wrong Number or if the Call Status is No Answer, Answered, or Voicemail after the last Cycle will be considered Undelivered. There is an existing Data View for these which is displayed in the Notification Dashboard.

9.7. Reporting Tools

Requirement:

Access to robust reporting tool that allows for customized reports for administrative users.

Response:

Dynamics 365 provides a rich set of reporting capabilities that have been described in earlier sections. The Reports Center was discussed in our response to requirement 9.4. And the extensive ad hoc reporting capability of Dynamics 365 was discussed in our response to requirement 1.12. In addition to these, Dynamics 365 also integrates with Power BI to provide rich data visualizations.

9.8. Performance Dashboards

Requirement:

Performance dashboards (measure program “success” and “health”) must be available.

Response:

Dynamics 365 provides robust dashboarding features that include list data, charts, custom html and JavaScript renderings, Power BI widgets and more. InfoStrat can build a Performance

Dashboard for CVAD that provides appropriate metrics and key performance indicators to monitor the health and success of the solution.

9.9. Enhancements

Requirement:

Administrators must have the access to all available enhancements and features regardless of device access (i.e. smart phone, tablet, computer).

Response:

Microsoft provides regular update for Dynamics 365. Minor updates are applied automatically; major upgrades must be scheduled, but once scheduled will be conducted automatically.

Microsoft provides a free mobile app for users of Dynamics 365 which is available in Windows (Windows Store), Android (Google Play), and Apple (Apple Store) mobile devices. All Dynamics 365 features are mobile enabled and all customizations can be made mobile enabled as well, to ensure that Dynamics 365 will have the as much as possible of the same experience regardless of device. The following link has details from Microsoft on the Dynamics 365 mobile capability: <https://technet.microsoft.com/en-us/library/dn531131.aspx>.

Finally, modifications and enhancements made for any SAVIN360 customer will be made available to all other SAVIN360 customers at no additional cost, except for services cost to deploy or modify the feature and any ongoing cost for third party services for the modification. As other states make changes, CVAD will be apprised and may choose to implement the enhancement; likewise, any new features introduced for CVAD will be offered to other states under the same conditions.

10. Training

Each proposal shall demonstrate how the Respondents will do the following

10.1. CVAD Staff

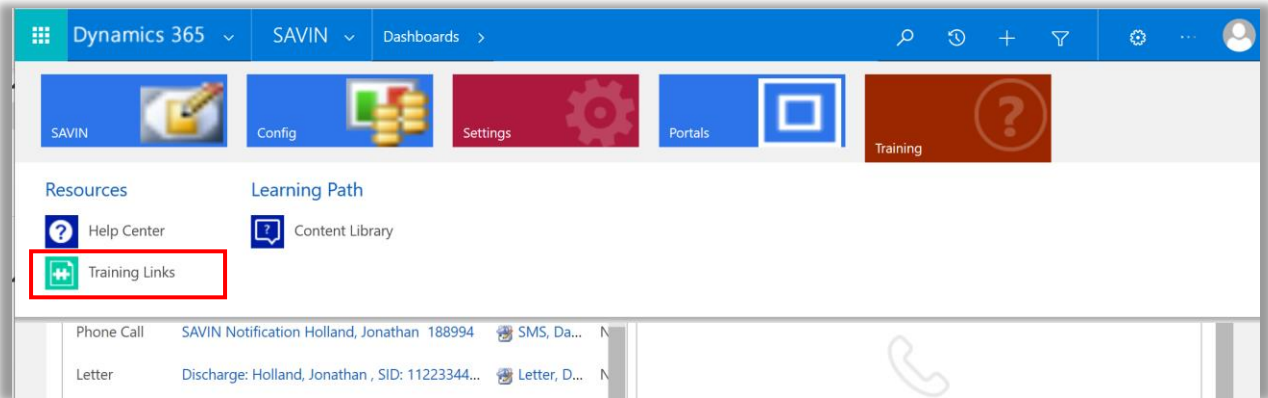
Requirement:

Train CVAD staff on the system & system user manual.

Response:

InfoStrat will comply with this requirement; below is a description of our approach to meeting the requirement.

Upon completion of the initial build, the standard SAVIN360 User Guide will be updated to reflect the Iowa specific implementation and provided to CVAD. It will be stored in SharePoint and will be accessible from the Training Links section of Dynamics 365, as depicted in the screen below.



Training Links

The Iowa specific user-guide will be updated as part of all system changes during the life of the contract.

In addition to user guides, InfoStrat will provide full system training to select CVAD staff at the start of UAT and to all CVAD staff who will use the system just prior to go live. Also, for the first week of UAT, InfoStrat will have a staff member on-site to conduct training and provide UAT support; for the remaining weeks of UAT, InfoStrat will provide 2 hours of support daily which would be conducted using a web share program (such as Go To Meeting, Zoom, Microsoft Teams).

The training session for all CVAD staff just prior to go live will be recorded and stored in the training links, displayed above.

Additionally, for the first year of the contract, we will conduct twice weekly check-in meetings of up to an hour each to help with system activities, answer questions, review reported issues, provide system tweaks and help understand system activities. These sessions provide an ongoing informal training that helps you to become more and more familiar with the solution, with Dynamics 365 and empowers you to use the system to its full potential. After the first year, if you wish to continue the sessions, we could amend the contract to continue.

10.2. External Users

Requirement:

Train external users and related professionals on the system.

Response:

InfoStrat will comply with this requirement; below is a description of our approach to meeting the requirement.

For the initial roll out, we will provide a series of webinars during the User Acceptance Testing period. These webinars will be about an hour each and recorded for later use by external users. There will be two different webinars: one for Victim Advocate type users and one for Law Enforcement/Jail Management type users. Each webinar will be provided three times during the Training period.

We will make a downloadable PDF portal user guide. Most browsers will open the PDF into the browser window or a new browser window. However, with the portal we can also embed the user guide in a frame; see the Texas Department of Criminal Justice public portal for an example (<https://ivss.tdcj.texas.gov/portal-user-guide/>).

Additionally, we can provide training videos that can be made available on the specialty portal for external users. Users will be able to access these videos at any time and links to the videos will be germane to the type of external user (Victim Advocate or Law Enforcement).

10.3. Branding and Marketing

Requirement:

Assist the CVAD in branding, marketing and outreach for the system.

Response:

InfoStrat will comply with this requirement; below is a description of our approach to meeting the requirement.

InfoStrat can help CVAD with development of branding, such as development of a system name, color schemes and logos. As part of our implementation we will develop new promotional materials using the branding and system naming. Promotional materials will include posters, pamphlets and tear off pad with registration information. These will be printed and distributed to the CVAD for dissemination to the Sites as CVAD sees fit. InfoStrat foresees printing all materials once per year. Likewise, PDF versions of promotional material will be added to the specialty portals for download and printing by users.

For outreach, we will provide a short (roughly 5 minute) video and a pamphlet that can be provided to victim services providers throughout the state. The video can be posted to YouTube or some other video streaming service and links to the video can be provided for service providers and criminal justice organizations to include on their web sites. Links can also be provided on the SAVIN360 website. Finally, InfoStrat can help craft press releases to help get the word out.

One other option could be considered: CVAD could export the email and phone numbers from the current solution and use that information to conduct a one-time Email and Phone blast to alert existing users about the service. This could be done using marketing features of Dynamics 365.

11. Implementation Plan

Requirement:

Plan for implementing the new Statewide Victim Information and Notification System

The Proposal must include a plan for implementing the Statewide Victim Information and Notification System. The plan must include a timeline indicating when the Respondent will meet the following milestones:

System build, by deliverable and/or system feature

Testing Period

System fully functional

Go-Live Date

Response:

InfoStrat will comply with this requirement; below is a description of our approach to meeting the requirement.

Implementation of SAVIN360 would take place on multiple concurrent tracks to accommodate a wide array of activities.

Implementation Tracks

The implementation tracks listed below constitute the major steps for implementation of the solution.

Project Management

To achieve the implementation schedule, InfoStrat will manage the project using an Agile methodology. We propose beginning the project with a kickoff and several days of in-person requirements development. InfoStrat has discovered early, onsite collaboration is important to efficient, effective development. Per Agile best practices, we will collaboratively develop the Agile Project Charter, User Stories, and a prioritized Product Backlog.

The Agile Project Charter replaces the traditional waterfall Project Management Plan with efficient documentation of the project vision, the team, success criteria, rules of engagement, and communications.

User Stories are created during requirements elaboration and built according to the INVEST model, so they are Independent (non-dependent, non-sequential), Negotiable (flexible and built through team collaboration), Valuable (to Iowa's final SAVIN360 solution); Estimatable; Small (designed, built, and tested in an iteration), and Testable (with agreed upon acceptance criteria).

The Product Backlog tracks all work: planned, underway, and completed. User Stories are estimated, prioritized, and the Backlog is groomed throughout the project. This provides full transparency amongst the team and encourages collaboration, which are critical to successful Agile implementations.

InfoStrat has found 4-week sprint cycles, with frequent client engagement, *i.e.*, daily to weekly interaction with subject matter experts and management, and monthly demonstrations lead to our most successful SAVIN360 implementations.

SAVIN360 Iowa Specific Configuration

This track involves configuring the primary features for notification including the identification of specific notification events, development of message text in English (translation will follow once messages are approved), categorization schema, master data, custody status change logic, and other configuration items. Also, Dynamics 365 recently introduced the Unified Interface, which InfoStrat will configure for the lower cost Power Apps license model and for use in the Dynamics 365 mobile application.

Telephony

InfoStrat will work with a third-party call center to stand-up 24-hour support and implement the PBX, IVR and phone registration scripts. This also includes call center staff training and

development of knowledge base for use by call center operators. This activity will be performed mostly by the call center technical staff in collaboration with the InfoStrat Analyst and CVAD staff.

Data Exchanges

The overall goal is to receive real time data from all Sites. However, to enable a short development cycle, InfoStrat proposes to do this as a two-phased activity.

In the first phase, InfoStrat will implement a data mapping service utility to receive the current flat file feeds from jails in a centralized SFTP; if the file provided by a particular Site is not a delta, then a comparison with the previous file is used to determine the delta. The utility will then map the data to a web service and archive the file. We have already developed such a utility and are currently using it within a SAVIN360 implementation.

Should CVAD choose to conduct the optional second phase, it will run concurrently; InfoStrat would work with JMS vendors to implement our web service within their solutions to provide real-time, transaction-based data exchange for each Site. Once a vendor has implemented, they will deploy the integrations to the Sites that run the JMS. Each Site will send data to a test environment, and monitoring will be conducted to compare the transaction data against the current flat file results. Once we are satisfied with the results for a Site, we will have the Site start sending transaction data to SAVIN360 and turn off the flat file process for that Site. The exact timeline for phase II cannot be determined at this time as we have not had conversations with all vendors to determine when they can implement the web service.

Department of Corrections data will be assessed to determine if the source is web service enabled. If it is, we will take the same two-phase approach. If it is not, then we will look in Phase II to modify the feed methodology to achieve a near real time methodology whereby movement data are provided in a transaction format, using flat files, and non-movement data are provided once daily in a large flat file format.

While the second phase is optional, and noted as such within the Cost Proposal, there are many advantages to moving towards data exchange via web service rather than flat files. The two-phase approach accomplishes two goals. First, it allows us to get the SAVIN360 solution up and running quickly for the state. And it provides for continuing improvement until all Sites are providing data in real time or near real time.

Portal Build

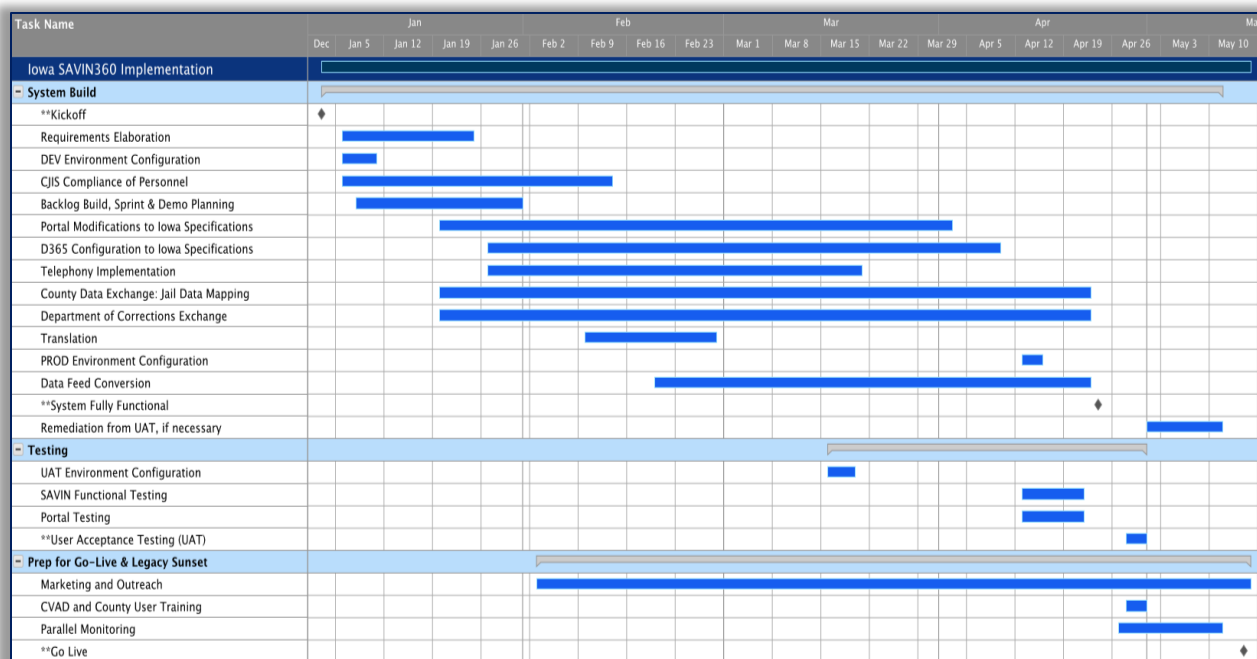
The SAVIN360 portal will require significant updates for state specific branding, new features required including Quick Escape, modifications for state specific table layouts and forms, specialty portal modifications, data validations, as well as updates to the existing portal framework, and updates to the middle ware components.

Project Schedule

The following high-level schedule is proposed using teams of two personnel each: CRM Team, Portal Team, Integration Team, and Test Team. This schedule assumes a project kickoff on January 3, 2020.

Iowa SAVIN360 Implementation			
System Build	01/03/20	05/11/20	
**Kickoff	01/03/20	01/03/20	PM, Architect, Analyst
Requirements Elaboration	01/06/20	01/24/20	Analyst, Architect
DEV Environment Configuration	01/06/20	01/10/20	Network Specialist
CJIS Compliance of Personnel	01/06/20	02/13/20	All
Backlog Build, Sprint & Demo Planning	01/08/20	01/31/20	PM, Architect, Analyst
Portal Modifications to Iowa Specifications	01/20/20	04/02/20	Portal Team
D365 Configuration to Iowa Specifications	01/27/20	04/09/20	D365 Team
Telephony Implementation	01/27/20	03/20/20	Telephony Team, CVAD
County Data Exchange: Jail Data Mapping	01/20/20	04/22/20	Analyst, Integration Team
Department of Corrections Exchange	01/20/20	04/22/20	Analyst, Integration Team
Translation	02/10/20	02/28/20	Third Party Service
PROD Environment Configuration	04/13/20	04/15/20	Network Specialist
Data Feed Conversion	02/20/20	04/22/20	Analyst, Integration Team
**System Fully Functional	04/24/20	04/24/20	All
Remediation from UAT, if necessary	05/01/20	05/11/20	D365 and Portal Teams
Testing	03/16/20	04/30/20	
UAT Environment Configuration	03/16/20	03/19/20	Network Specialist
SAVIN Functional Testing	04/13/20	04/21/20	Test Team
Portal Testing	04/13/20	04/21/20	Test Team
**User Acceptance Testing (UAT)	04/28/20	04/30/20	CVAD, Analyst
Prep for Go-Live & Legacy Sunset	02/03/20	05/15/20	
Marketing and Outreach	02/03/20	05/15/20	PM, CVAD
CVAD and County User Training	04/28/20	04/30/20	CVAD, Analyst
Parallel Monitoring	04/27/20	05/11/20	Test Team
**Go Live	05/15/20	05/15/20	CVAD, All

Project Schedule



Project GANTT

Project Milestones

All the items listed in the above schedule constitute milestones in implementation. Of these, Key Milestones include:

- SAVIN360 Configuration and Dynamics Modifications—at this point, notifications could be delivered were data available. This milestone is expected to be met at Kickoff + 14 weeks.
- Portal Modifications—at this point, all features of the portal could be made available to the public. This milestone and the Dynamics Config milestone form the System Build complete and are expected to be completed on Kickoff + 13 weeks.
- Data Exchanges—this is the point at which SAVIN360 can begin receiving data; this constitutes two milestones:
 - Jail Exchanges—minor milestones within this would be completion of mapping for each jail
 - Corrections Exchange
 These milestones are expected to be completed on or before Kickoff + 16 weeks.
- Telephony Implementation—this is the point at which the IVR and Call Center solutions are prepared to support operations. This milestone is expected to be completed on or before Kickoff + 11 weeks.
- UAT Environment Config—this is the point at which the solution is ready for CVAD User Acceptance Testing. This milestone comprises the Testing Period begin and are expected to be completed on Kickoff + 17 weeks.

- Production Environment Config—this is the point at which the production system is ready for operations. This milestone is expected to be completed on or before Kickoff + 16 weeks
- Data Feed Conversion—this is the point at which offender population data have been loaded into the system and feeds are being received and processed in production from all Sites. This milestone comprises the System Fully Functional milestone and is expected to be completed on Kickoff + 16 weeks.
- Once Data Feed Conversion has completed, InfoStrat recommends a monitoring period of two or more weeks to compare results of the SAVIN360 implementation and the legacy solution.
- Go Live—this is expected to occur at Kickoff + 19 weeks. Assuming a Kickoff of Jan 3, 2020, Go Live would occur on or about May 15, 2020.

12. Maintenance and support

Each Respondent must describe in its proposal the maintenance and support for the system that it proposes for the term of the contract. At minimum, each Proposal must address how the following will be provided:

Response:

InfoStrat will comply with this requirement; in each subsection below is a description of our approach to meeting the requirement.

12.1 Monitoring

Requirement:

Data monitoring, including staffing plan, to ensure the appropriate flow of data from the Sites to the Statewide Victim Information and Notification System. Data monitoring shall occur 24 hours a day, 365 days a year.

Response:

SAVIN360 has multiple built-in monitors to detect various system conditions. These tend to focus on data flow, data conflicts and workflow issues.

Facility Outage Monitor

SAVIN360 solution tracks all inbound data exchanges based on the Site. Each Site is assigned a threshold, based on the Site's expected booking and release rate, indicating the maximum period of time since anyone was updated. This threshold is coordinated with the Site based on the normal schedule of movements. For a larger, more urban jail, a short threshold of an hour or two would be appropriate whereas for a rural jail, a threshold of a few days might be more appropriate. An automated process checks the facility record to determine if a threshold has been crossed and, if so, it sends an email alert to a defined list of individuals including SAVIN360 Support Staff, Site Staff, the InfoStrat support and other relevant stakeholders—each site establishes its own list of recipients.

There is a second tracking device as well, particularly useful for Sites with larger thresholds, we call this the Connected method. Every 15 minutes to an hour, the Site will send a message, sort of a ping, to let SAVIN360 know that the Site still has connectivity. We can set a separate

Connected threshold for each site, so that we can learn earlier if connectivity has been lost though the data threshold for the Site has not yet been crossed. The following screen shows the configuration of these thresholds.

The screenshot shows a web application interface for configuring JMS (Justice Management System) settings. At the top, there is a header bar with the following information: FACILITY : ADMIN, CHESTER COUNTY, Facility Name* CHESTER COUNTY PRISON, Facility Type County Jail, and City WEST CHESTER. Below the header, there is a section titled JMS. The first row in this section is 'JMS Integrated' with a checked checkbox. Below this is a 'Settings' section containing four rows of configuration: 'Report Threshold (minutes)' set to 120, 'Follow-Up Timeout (minutes)' set to 60, 'Connected Threshold (min)' set to 15, and 'Connected Follow Up (min)' set to 30. There is also a 'Release Time Default' field with a dotted line. Below the settings is a 'Feed Governor' section with two rows: 'JMS Account' with a dotted line and 'Count' with a dotted line, and 'JMS Alert' set to 'No' and 'Time in Minutes' with a dotted line. At the bottom is an 'Emergency Contact Procedure' section with a dotted line.

FACILITY : ADMIN		Facility Name*	Facility Type	City
CHESTER COUNTY		CHESTER COUNTY PRISON	County Jail	WEST CHESTER

← JMS

JMS Integrated		<input checked="" type="checkbox"/>	
Settings			
Report Threshold (minutes)	120	Follow-Up Timeout (minutes)	60
Connected Threshold (min)	15	Connected Follow Up (min)	30
Release Time Default		
Feed Governor			
JMS Account	Count
JMS Alert	No	Time in Minutes
Emergency Contact Procedure			
.....			

Facility Data Monitoring Thresholds

Note that each threshold has a follow up timeout in which a second alert will be generated if the issue has not been resolved. There also is an Emergency Contact Procedure field in which instructions for what to do in the event of a Site outage can be written; this information will be included in the email alert. The following screen shows an example of an email alert, the Emergency Contact Procedure is outlined.

From: 1-doc-sort ServiceAccount <savin@idoc.in.gov>

Sent: Thursday, September 12, 2019 5:30 PM

To: Danny Shannon <dannys@infostrat.com>; Kyle Ruud <kyle@infostrat.com>; Mike Pitman <mpitman@clintonco.com>

Subject: IDOC JMS Notification Follow-up -037000390998

This email has been sent to notify you that Clinton County Jail has not provided any data to SAVIN since 9/10/2019 4:10 PM. Please determine if connectivity has been lost, if there is some other type of issue, or if there legitimately have been no updates during this time.

Please contact Elon Musk at 303-888-9887 to restart the Prime Service.

Please contact InfoStrat at helpdesk@infostrat.com to provide updates regarding the troubleshooting and resolution of this issue.

Thank you

Indiana SAVIN Team

Sample Facility Outage Alert Email

These mechanisms are particularly useful when direct data exchange (the Phase II real-time data exchanges) are implemented. For Phase I, the Last Update for the Site's facility record will be updated each time data are added from the flat files and the Last Connected Update will be updated each time a file is received. As a Site moves to direct data exchange in Phase 2, we will make some adjustment to the settings.

When an Alert is triggered, the email is sent to the Site's distribution list with an inquiry as to whether the outage is real or simply that there have been no updates and the last update is accurate. InfoStrat will be on the distribution list and will check to see if the outage is a SAVIN360 issue or the sending agency issue.

When a Site is in an outage condition, logic in the specialty portal for Law Enforcement allow the Site staff to update the custody status of incarcerated offenders directly in the Portal; and they can book a new offender as well. Updates made manually will not result in a duplicated event when the Site comes back online, should the system send the updates automatically.

As to SAVIN360 system outages, Indiana SAVIN360 has been in operation since 2010, South Dakota has been in operation since 2015, and TDCJ (Texas) has been in operation since 2018 and none has encountered a system outage. The solution will be implemented in the Microsoft Cloud for Government and maintains a 99.99% uptime. The Microsoft Service Level Agreements for Dynamics 365 can be found at this link: <https://docs.microsoft.com/en-us/office365/service-descriptions/office-365-platform-service-description/service-level-agreement>.

It is important to note that for the entire period that state have used this solution, there has never been an outage due to non-availability of SAVIN360. And, Site outages historically occur for one of three reasons:

- The Site does not have internet connectivity
- The Site is under planned maintenance, so no messages are being sent.
- The Site has not booked or released any offenders and the data threshold was crossed—this is the most prevalent reason for outage messages.

Since the last case is the most prevalent, and does not actually constitute an outage, we can say that actual Site outages do not really occur with our solution and when they do, it is a planned activity, or it is a Site network issue.

Data Feed Governor

In addition to monitoring for outages, other data monitoring that has been automated includes monitoring for too many of the same kind of event (the Notification Governor described in our response to requirement 1.9) and monitoring for too many updates from the same Site. In this latter scenario, SAVIN360 keeps count of all updates made by a Site during the day (this does not include updates using the Connected method) and compares that against a daily threshold. If too many updates are made during the day, an alert would be sent to the distribution list for the Site and all notifications for that Site would be placed on hold until the determination was made as to whether there was an issue. The screen below shows the Site configuration.

IEPD SENDER : INFORMATION
Department of Correction

General

Name *	Department of Correction	Owner *	H. Jamison
User Id	-----	Contact	-----
Enabling Governor	Yes	Stopped	Yes
Threshold Max	16,450	Threshold Counter	12
Reset Time	9/28/2019 4:33 PM	Override Governor	No

IEPD Ping

Last IEPD Ping Date	9/27/2019 10:26 PM	Next Expected IEPD Ping Date	9/27/2019 10:36 PM
Missing IEPD Ping Alert Sent	No	IEPD Ping Frequency (in minutes)	10

Site Update Count Threshold Configuration

When an alert occurs, any erroneous notifications can be stopped using the Stop mechanism and deactivated. Once the Stop is removed, all remaining valid notifications will continue.

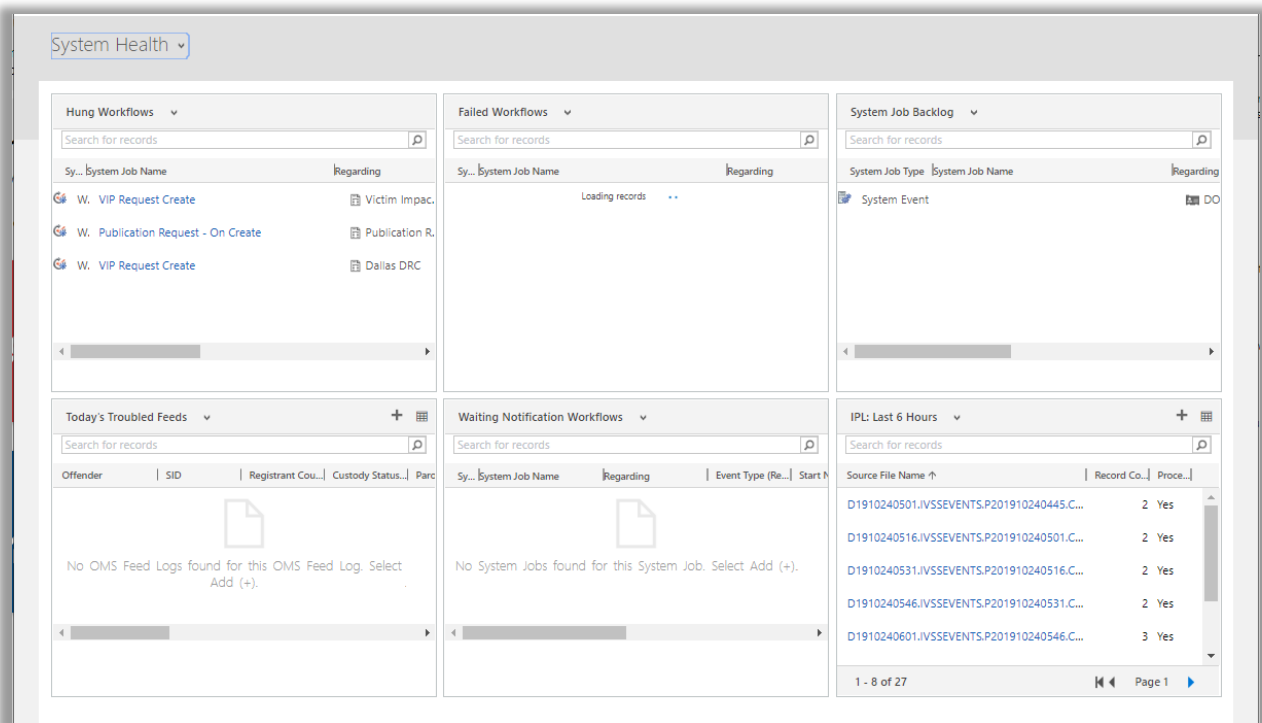
System Health Dashboard

Finally, SAVIN360 provides a system health dashboard, into which is configured a set of data views that look for error conditions in the underlying processes, such as workflows, processing logs and exceptions on feed logs.

The dashboard is customized for each state, as each has unique processing requirements. However, this is a quick way to determine if anything appears to be out of order within the system. Typical elements include:

- Hung Workflows: these are workflows that cannot be completed because data are missing, or a child workflow has been disabled. The underlying condition need only be updated, and the workflows can be restarted.
- Failed Workflows: these are workflows that failed to complete an assigned action and the workflow cannot be restarted. A new instance of the workflow must run or a manual change is required.
- Troubled Feeds: these are data feed logs in which an exception occurred.
- System Job Backlog: this provides a listing of workflows and other processes that have not completed processing and the monitor is watching to see if there are too many.

The screen below shows a sample dashboard.



System Health Dashboard

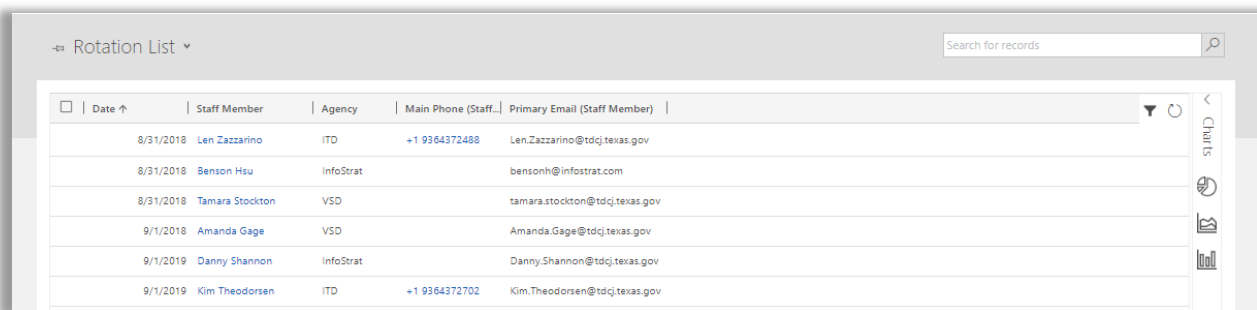
12.2 Support

Requirement:

Support, including staffing plan, for system failures, outages, booking system changes, or any other system disruption, including a definition of what each term means to the Respondent, as well as a description of response time for each, a resolution process and time for each and an outline for any penalties to be assessed to the Respondent for failing to adhere to these standards.

Response:

As part of the monthly costs, InfoStrat will provide on-going support for troubleshooting and correction of issues. In addition, for afterhours support, SAVIN360 provides a Rotation entity into which can be configured the On-Call staff member for support. Typically, we would request a person from each group: InfoStrat, Operations and IT so that if there is an issue all three can work on the issue as appropriate to their domain. This list can be updated on a recurring basis so that the rotation is known well in advance to enable people to plan vacations and other time off.



Date	Staff Member	Agency	Main Phone (Staff)	Primary Email (Staff Member)
8/31/2018	Len Zazzarino	ITD	+1 9364372488	Len.Zazzarino@tdcj.texas.gov
8/31/2018	Benson Hsu	InfoStrat		bensonh@infostrat.com
8/31/2018	Tamara Stockton	VSD		tamara.stockton@tdcj.texas.gov
9/1/2018	Amanda Gage	VSD		Amanda.Gage@tdcj.texas.gov
9/1/2019	Danny Shannon	InfoStrat		Danny.Shannon@tdcj.texas.gov
9/1/2019	Kim Theodorsen	ITD	+1 9364372702	Kim.Theodorsen@tdcj.texas.gov

On Call Rotation List

We have been supporting SAVIN360 for more than 9 years and have had fewer than 10 afterhours calls in that time. For on-premise installations, the only system outages that have occurred have been from automated Windows restarts in which Services for the Dynamics 365 were not automatically enabled. We have seen no issues with Dynamics 365 in the Microsoft Cloud for Government.

Our response times are outlined in our response to Requirement 12.3.

As regards penalties, since the solution runs on Dynamics 365 in the Microsoft Cloud or on premise at the customer site, InfoStrat does not control the environment in either case; penalties on InfoStrat for system outages of Dynamics 365 would not be appropriate. Microsoft's SLA provides for remedies for system outages.

Upgrades

Microsoft provides updates to Dynamics 365 upgrades on a regular basis. Some are applied automatically and others, representing more significant upgrades, must be scheduled. When such an upgrade is available, InfoStrat will upgrade the Development environment first and conduct regression testing to discover any issues proactively. After regression testing, InfoStrat will schedule the UAT environment for upgrade, upon which CVAD would test. Following successful test in UAT environment, the Production system would be upgraded.

Any modifications and enhancements made for any SAVIN360 customer will be made available to all other SAVIN360 customers at no additional cost, except for deployment and modification support and any ongoing cost for third party services for the modification. Information about other states' modifications, including deployment and ongoing costs, will be provided to CVAD after the modification has been rolled out in the other state to determine if CVAD wishes to implement the feature. If so, InfoStrat will implement the feature for Iowa; a change order may be required to add deployment, modification and ongoing costs. Likewise, any modifications made for Iowa will be available to other SAVIN360 customers under the same conditions.

12.3 Service Level Agreement

Requirement:

Respondent should submit a copy of their standard service level agreement. If no standard or template agreement is available, Respondent should so indicate.

Response:

InfoStrat will provide ongoing maintenance and support as part of the monthly cost of operation and will act as the first point in any support issues. Issues revolving around any of the processes in SAVIN360 will be investigated based on severity level by InfoStrat technical staff based on the following issue classification.

Issue Classification

1. Catastrophic: Defects that could (or did) cause disastrous consequences for the system in question (*e.g., critical loss of data, critical loss of system availability, critical loss of security, critical loss of safety, etc.*)

SLA: Issue reported during will be responded to within 4 hours. If the issue cannot be resolved within 4 hours an estimate will be provided with email updates on progress every four hours until issue is resolved.
2. Severe: Defects that could (or did) cause very serious consequences for the system in question (*e.g., a function is severely broken, cannot be used and there is no workaround.*)

SLA: Issue reported will be responded to within 24 hours. If the issue cannot be resolved within 24 hours an estimate will be provided with email updates on progress every day until issue is resolved.
3. Major: Defects that could (or did) cause significant consequences for the system in question; defect that needs to be fixed but there is a workaround (*e.g., function is badly broken but workaround exists*)

SLA: Issue will be responded to within two working days. If the issue cannot be resolved within two working days an estimate will be provided with email updates on progress every two days until issue is resolved.
4. Minor: Defects that could (or did) cause small or negligible consequences for the system in question. Easy to recover or workaround (*e.g., error messages misleading; displaying output in a font or format other than what the customer desired; simple typos; bad layout or misspelling on screen*)

SLA: Issue will be resolved as time is available.

5. Enhancement: Suggestions to enhance the system.

No SLA.

The solution will be implemented using Dynamics 365, which is a cloud solution hosted by Microsoft in the Office 365 community of applications. Microsoft provides a guaranteed 99.9% service uptime for Office 365 applications. A full copy of the Microsoft Service Level Agreement can be found here:

<http://www.microsoftvolumelicensing.com/Downloader.aspx?DocumentId= 7421>

InfoStrat uses CDYNE cloud services for external communications via Text and Robo-Call, as well as data quality checks for registrant and other data. CDYNE guarantees 100% availability of all services: <http://cdyne.com/company/100-percent-uptime>.

InfoStrat uses Westpark Communications, L.P for Call Center and IVR services. Westpark guarantees 99% uptime for IVR and live operators services.

Supplemental Information

The following is provided to provide a little more detail about our solution and to demonstrate features that are available that could be accessed. Some have additional configuration cost and ongoing operations costs.

InfoStrat implemented the SAVIN360 Victim Notification solution for the Indiana Department of Correction (IDOC) in 2010. The base solution was implemented as a replacement for VINE, using existing data exchanges and migrating VINE data as initial seed data, with the initial design meant to reproduce the VINE solution feature set and data exchanges; InfoStrat implemented the base solution in 7 weeks. Some intentional variation from the VINE feature set was included in the design—personal calls by IDOC staff, categorized notifications, confirmation of registration, and feedback—all meant to personalize the experience for the victim. After initial Go Live, significant enhancements to make data exchanges true near real time and to add a wide range of new features such as those described in the features list below.

In 2014, the South Dakota Attorney General's Office, after researching all the solution options, chose the InfoStrat SAVIN360 solution for their Victim Notification needs. The solution implementation included the base SAVIN360 solution built for Indiana, but required some additional changes to allow for a more closed type of system and the exclusive use of the SAVIN SSP (NIEM standard, web service interface). The solution also provided expanded special access portals for county prosecutors and law enforcement officials that provide a wider range of capabilities to county users such as proxy registration, victim vetting, offender booking and release updates (for jails with JMS outages or are not integrated), reports and more.

Last fall, the Texas Department of Criminal Justice (TDCJ) implemented the solution and expanded it to become a victim services suite of solutions including such things as victim case management, statewide victim services resource clearinghouse, victim services training and event management, victim-offender mediation case management, apology bank, and a wide range of other solution, all built in the same solution. Thus, SAVIN360 is now a full victim

services suite that uses the data from all data sources to provide and manage a much broader set of services to victims in addition to notification. TDCJ also implemented some additional notification concepts such as individualized notifications, in which a specific notification is initiated for one registrant regardless how many people are registered for the offender.

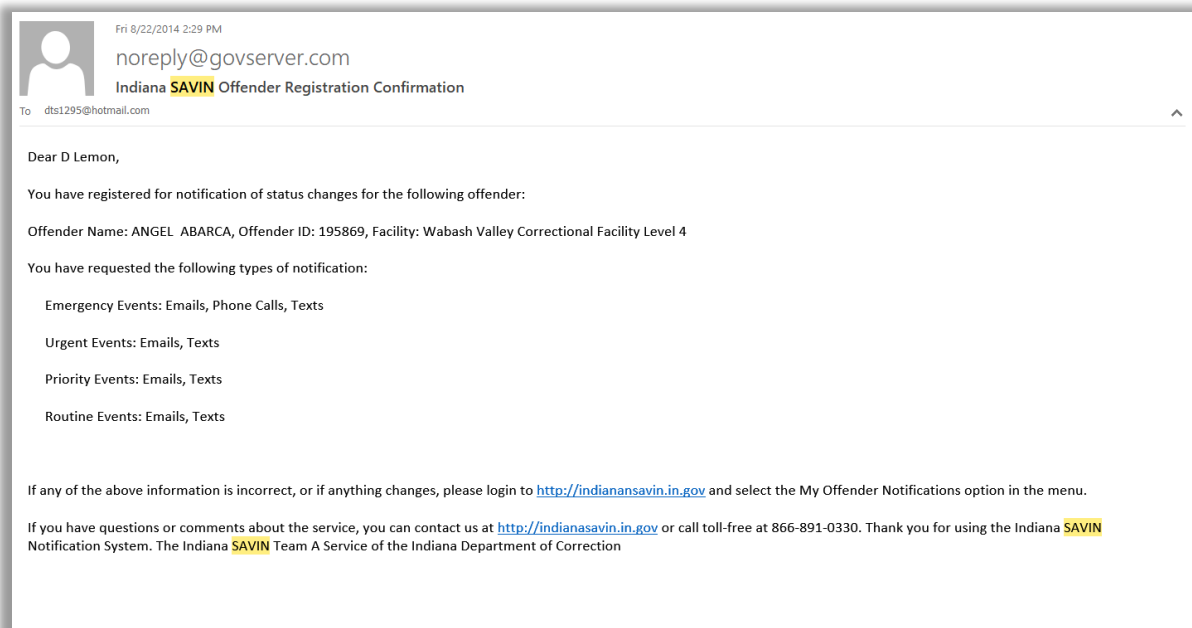
In addition to the features requested, the SAVIN360 solution also contains the following features that CVAD may find useful:

Constituent-Offender Relationship Tracking

SAVIN360 provides methods for determining the relationship between the Constituent and the Offender. This can be done at the time of registration by the Constituent, or as part of a data feed, or manually by the Victim Services staff of the sponsor. This logic can be used for reporting and for other logic (such as for expanded notification options).

Confirmation Emails

SAVIN360 provides an email to a constituent who has registered for an account or for notification of an Offender as a confirmation message. A confirmation message also is sent when a constituent updates their profile or registration details for notification. This provides assurance to the constituent that they truly have “signed up.” The following screen is a sample email for a registration for an offender.



Confirmation Email

My Dashboard

SAVIN360 provides a dashboard on the SAVIN360 Portal whereby logged in users can quickly and easily see the current status of all offenders for which they have registered and to modify the registration settings for each; to view recent notifications and even stop calls for those that are still in process, and subscribe to service providers. The following screen depicts the My Dashboard in the SAVIN360 portal.

Integrated Victim Ser... > My Dashboard

My Dashboard

My Registrations

Offender ↑	SID (Offender)	TDCJ Number (Offender)	Relationship	Registration Date	Constituent
Badguy, Danny D	12345678	77766655	Actual Victim of the Offense	4/15/2019	Danny Shannon
Simpson, Homer	homer123		Actual Victim of the Offense	6/18/2019	Danny Shannon

My Recent Notifications

Search

Offender	SID	TDCJ Number	Event Type	Event Date ↓	Category	Email Requested	Letter Requested	Phone Requested	SMS Requested	TTY Requested
Simpson, Homer	homer123	12345678	Parole Eligibility Process (Case Pull)	6/17/2019 8:00 AM	Priority	Yes	Yes	No	Yes	No
Badguy, Danny D	XX655544	77766655	Out of State- Parolee Approved Transfer back to Texas	9/24/2018 8:00 AM		Yes	Yes	No	Yes	No

My Providers

Search for more Resources

Organization	City	Phone	Website
Amarillo Area CASA	Amarillo	806-373-2272	http://www.pleasebeacasa.org
Austin Child Guidance Center	Austin	512-451-2242	https://www.austinchildguidance.org/
Victim Assistance Centre, Inc.	Houston	713-755-5625	

My Dashboard

Clicking Details link for a specific row allows the constituent to modify or remove the registration. The following screen depicts the modification screen.

REGISTRANT: SAVIN
Contact: Registered for KURT EDWARD W...

Constituent*
Legacy 90000037

Offender*
BETO WOLF

Relationship
Victim

General

Offender Name*	BETO WOLF	County Of Offense	Montgomery
Constituent Name*	Legacy 90000037	Source	Legacy
Relationship	Victim	Method	Legacy
Registration Date	9/13/2019	OVA active?	No

Contact Methods

Contact Method	Emergency	Urgent	Priority	Routine
Emailjoshua3_11@yahoo.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Red indicates nonpreferred notification method, selection not allowed.

Offender Registration Screen

Annual Follow Up

An ongoing issue for any victim notification solution is the validity of the contact data for the victim. Phone numbers, in particular, present a more recurring problem because the constituent can change phone numbers, and someone can inherit the old number which was used to register. The same is true for text messaging numbers; addresses change occasionally, emails get deactivated. SAVIN360 addresses this in a several ways as part of normal operations, but the solution also proactively searches out constituents who have not made any changes to the contact data for more than 1 year and requests them to confirm their information. This is done as emails, letters and phone calls, based on what data are provided.

Feedback Handling

SAVIN360 provides a feedback option whereby anyone can provide input or make inquiries through the portal. This feedback is immediately forwarded to the Victim Services staff for review and, if any response is needed, Dynamics 365 (the administrative tool) provides easy means for response. If the feedback is provided by a defined portal user, the feedback and response will be linked to the user's record in Dynamics 365. The following screen depicts the feedback feature on the SAVIN360 portal.

Feedback

Title *

Email

Comments

Submit

Portal Feedback Screen

When feedback is received, a record is created in Dynamics 365 and workflows can be configured to send a confirmation of receipt email to the submitter if an email address is provided. Users can open a list of feedback received on the main screen; by default, the most recent will be on top.

Date	Respond	Title	Email	Comments
10/1/2019	No	Invite You to Test Our Product	baldyga@interactivew...	Invite You to Test Our Product Hi, I am Maryett...
9/23/2019	No	Testing	heatherhiester@gmail...	Does the Contact Us/Feedback page work?
8/13/2019	No	Get The Best Value in Pro Email Marketing Tools...	irma@interactivewise...	Get The Best Value in Pro Email Marketing Tools...
8/6/2019	No	I love this site	dts1295@yahoo.com	Danny should get a raise!
8/5/2019	No	test		test
8/5/2019	No	I love this	dannys@infostrat.com	This is great. Danny should be paid more.

Feedback List in Dynamics 365

You can open a record to view the details and mark any action you take. The following screen displays a feedback record in Dynamics 365.

WEBSITE FEEDBACK : INFORMATION

I love this site

Feedback

Subject I love this site

Date 8/6/2019 Email dts1295@yahoo.com

Comments

Danny should get a raise!

Staff Response

Responded ☒ Follow-Up Date

Feedback Record in Dynamics 365

Notification Failover

SAVIN360 tracks the success of each notification to make sure that the constituent was notified in some way. Phone Calls, Emails, Text Messages and Letters are tracked for successful delivery and if a failure occurs, SAVIN360 automatically looks to see if some other method succeeded and, if none succeeded, determine if other options exist and use those. Business rules can be easily implemented to determine the appropriate method of failover. SAVIN360 tracks each kind of message sent for an event to determine if it was sent and if it was returned. The following screen shows the notification tracker list for a notification.

NOTIFICATION : ADMIN

Notify escape Benson Hsu: BART A SIMPS...

Constituent Benson Hsu Offender BART A SIMPSON Event Type Escape Stop Notifications No

Notification Tracker Associated View

Search for records

Event Type	Type	Contact	Offender (Noti...)	SID (...)	DOC ...	Category	Reque...	Sent	Sent Date...	Retur...	Returned ...	Call Status	Conf...	Conf
Escape	SMS	Benson Hsu	BART A SIM...			Emergency	Yes	Yes	8/9/201...	No		No		
Escape	Email	Benson Hsu	BART A SIM...			Emergency	Yes	No		No		No		
Escape	Phone	Benson Hsu	BART A SIM...			Emergency	Yes	Yes		No		Pending	No	
Escape	Phone	Benson Hsu	BART A SIM...			Emergency	Yes	Yes		No		Pending	No	
Escape	Address	Benson Hsu	BART A SIM...			Emergency	No	No		No		No		

Notification Tracker for Failover

Event Based Notification Governor

SAVIN360 provides a means of preventing erroneous notification that can occur when a source system erroneously passes a large number of changes that are not accurate. The SAVIN360 solution uses an event-based governor in which each type of event is given its own threshold and if a threshold is crossed, only notifications for that event are stopped until a determination is made as to accuracy. For example, 30 Parole Releases in an hour is probably not an issue, whereas 5 Deaths in an hour probably is an issue. Thus, if the 5 deaths per hour threshold is crossed, an alert is sent to the Victim Services staff but only Death notifications are stalled while the situation is investigated; all other types of notifications continue. If it is determined that the 5 Deaths were in error, any notifications that would have been sent can be cancelled; if it was not an error, the notifications can be continued with a single mouse click by an administrator. The following screen depicts configuration of the notification governor.

The screenshot shows a configuration window for the 'Death' event type. At the top, it says 'EVENT TYPE : ADMIN' and 'Death' with a dropdown arrow. To the right, there are two status boxes: 'Modified On' with a calendar icon and the date '10/5/2018', and 'Stopped' with a lock icon and the value 'No'. The main area is titled 'Notification Governor' and contains a table with the following data:

Enabled	Yes	Stopped	No
Threshold Count	5	Last Governor Stoppage	-----
Threshold Time (minutes)	60		

Notification Governor Configuration Screen

Were the threshold crossed for this event type, the Stopped value would be Yes and there would be a Date/Time value in the Last Governor Stoppage field.

Complete Communication History

Because SAVIN360 is built in Dynamics 365, it leverages the out-of-the-box capability of tracking all communications with a constituent including being able to track all inbound calls, emails, text responses, etc. All these can be found from the constituent record. The following screen depicts the communication history for a constituent.

CONTACT : ADMIN Danny Shannon		Full Name Danny Shannon	Victim ID 70000001	CJ Subscriber Yes	Registrant Count 7
Filter on: All					
NEW ACTIVITY ADD EXISTING ACTIVITY BULK DELETE CHART PANE RUN REPORT EXCEL TEMPLATES EXPORT ACTIVITIES TRACK EMAILS BY FOLDER					
Subject	Activity Type	Priority	Owner	Created By	Date Created
Phone Call Pending after 4 consecut...	Email	Normal	Danny Shan...	Danny Shan...	10/17/2019 1:06 PM
Phone Call Pending after 3 consecut...	Email	Normal	Danny Shan...	Danny Shan...	10/17/2019 1:01 PM
Announcing the Integrated Victim S...	Email	Normal	Amanda Ga...	Amanda Ga...	10/17/2019 12:10 PM
Second Alert: No OMS Records Gen...	Email	Normal	Danny Shan...	Danny Shan...	10/13/2019 12:38 AM
Alert: No OMS Records Generated C...	Email	Normal	Danny Shan...	Danny Shan...	10/13/2019 12:38 AM
Publication Request	Order Close	Normal	Mitchell Mc...	Mitchell Mc...	10/11/2019 8:56 AM
Publication Request	Order Close	Normal	Mitchell Mc...	Mitchell Mc...	10/10/2019 6:29 PM
October 2019 VAC Bulletin CRM:019...	Email	Normal	Clearingho...	Mike Jones	10/8/2019 1:34 PM
October 2019 VAC Bulletin (IVSS)	Email	Normal	Clearingho...	Mike Jones	10/8/2019 11:17 AM
Parole Denied by Board: RODRIGUE...	Letter	Normal	Notification	Danny Shan...	10/3/2019 8:34 AM

Communication History for Constituent

Audit Trail

Dynamics 365 provides a feature for tracking all relevant changes in the SAVIN360 database. This enables administrators to determine what data was changed, by whom, when and from what value to what value. With multiple data sources attempting to update the same offender record, understanding what system updated data values. The following screen displays the Audit History of an offender record.

OFFENDER : ADMIN zzTestzz, zzTestzz		Custody Status Parole	Facility AUSTIN Parole Office 2	SID zz234567	MRD 4/9/2030
Audit History					
Filter on: All Fields					
DELETE CHANGE HISTORY					
Changed Date	Changed By	Event	Changed Field	Old Value	New Value
10/25/2019 10:5...	Danny Shannon	Update	Portal Display	Display	Do Not Display
8/8/2019 11:37 ...	Danny Shannon	Update	SID	01234567	zz234567
6/11/2019 3:27 ...	Danny Shannon	Update	TDCJ Number	98765432	zz765432
6/11/2019 3:19 ...	TDCJ VictimServi...	Update	Date of Birth		3/1/1975
			Address City		
			Address State		
			Address Street 1		
			Address Street 2		
			Address Zip Code		
			County Offender		
			EPRD Change 30 ...	No	
			EPRD Change 60 ...	No	
			EPRD Change Fina...	No	
			EPRD Change Im...	No	
			EPRD Original Cha...	No	
			EPRD Original Cha...	No	
			EPRD Original Cha...	No	
			EPRD Original Cha...	No	
			PRD		
			Release Date	6/7/2019	6/11/2019
			Significant Chang...		
6/11/2019 3:14 ...	TDCJ VictimServi...	Update	Previous Parole Ac...		
6/11/2019 3:14 ...	Danny Shannon	Update	PRD	4/9/2025	
6/11/2019 3:13 ...	M...	Update	Custody Status Ti...	4/9/2019 8:00 AM	6/11/2019 8:00 AM

Audit of Changes to Offender Record

The screen also provides filtering to search changes to a specific data field. In the screen below, the Audit History is filtered by Facility.

The screenshot shows the 'Audit History' interface. At the top, there's a header with user information (OFFENDER: ADMIN, zzTestzz, zzTestzz) and system details (Custody Status: Parole, Facility: AUSTIN Parole Office 2, SID: zz234567, MRD: 4/9/2030). Below the header, the 'Audit History' section has a 'Filter on:' dropdown menu set to 'Portal Display'. A 'DELETE CHANGE HISTORY' button is visible. A table displays the audit history with columns: Changed Date, Changed By, Event, Changed Field, Old Value, and New Value. The table contains two entries: one from 10/25/2019 10:5... by Danny Shannon (Update) for Portal Display (Old Value: Display, New Value: Do Not Display), and another from 4/18/2019 3:33... by Danny Shannon (Create) for Portal Display (Old Value: Display, New Value: Display).

Changed Date	Changed By	Event	Changed Field	Old Value	New Value
10/25/2019 10:5...	Danny Shannon	Update	Portal Display	Display	Do Not Display
4/18/2019 3:33 ...	Danny Shannon	Create	Portal Display	Display	Display

Filtered Audit for Specific Data Element

Self-Service Operational Configuration

SAVIN360 was designed to enable the administrator to manage the day-to-day operations as notification schemas, messages, and system values. This allows the Program Manager and permitted staff to manage many of the notification process elements, rather than going to a vendor to make the changes. Some of these are described below:

Event Types

whenever the need arises for adding new types of events, SAVIN360 provides a centralized tool for the Program Manager and permitted to create event types. For example, if state law changes to allow for home detention via electronic monitoring where no such type of custody existed before, SAVIN360 provides a simple means to allow for the event type to be provided through data feeds simply by adding a record to the data type interpretation table. The following screen shows the feed configuration form whereby the incoming data can be interpreted.

The screenshot shows the 'Data Exchange Event Types Configuration Screen'. The header indicates 'IEPD EVENT TYPE : SAVIN' and '05'. The main form is divided into several sections: 'General', 'Custody Details', 'Parole Action Details', and 'Messaging'. The 'General' section includes fields for Name (05), Source Process (Prison Feed), Description (Discharge), Event Category (Corrections), Effective Date (6/30/2018), Type of Event (Custody Status Change), Effective End Date, Create Alert (No), and Ignore Result. The 'Custody Details' section includes Custody Status (Discharge) and Detainer (No). The 'Parole Action Details' section includes Parole Action. The 'Messaging' section includes Notification Message.

General	
Name	05
Description	Discharge
Event Category	Corrections
Type of Event	Custody Status Change
Create Alert	No
Effective Date	6/30/2018
Effective End Date	
Ignore Result	
Custody Details	
Custody Status	Discharge
Detainer	No
Parole Action Details	
Parole Action	
Messaging	
Notification Message	

Data Exchange Event Types Configuration Screen

In addition, SAVIN360 maintains a Notification Event Type list which is used to determine if a notification is to be conducted and what the messages should be. These are called the Notify Rules. Notify Rules allow you to create a new type of notification and to define the attributes of the notification, such as category, built in wait time, whether the notification is generally available or limited in scope, governor settings, and messages to be used. The Notify Rule also has a Do Not Process capability such that all notification actions can be conducted except the delivery to the recipients to allow for testing and adjusting the notification or messages. The following screen shows the Notify Rule configuration form.

The screenshot displays the 'Notify Rule' configuration form for the 'Discharge' event type. The form is organized into several sections: 'General', 'Notification Governor', and 'Calls Cycles'. The 'General' section includes fields for 'Event Type' (Discharge), 'Category' (Urgent), 'Notification Wait Time' (0), 'Owner' (Danny Shannon), 'Do Not Process' (No), 'General Notification' (No), 'Media Notification' (empty), 'Include in SMS Limited' (empty), and 'Do Not Send Letters' (empty). The 'Notification Governor' section includes 'Enabled' (No), 'Stopped' (No), 'Threshold Count' (empty), and 'Threshold Time (minutes)' (empty). The 'Calls Cycles' section includes 'After Hours Calls' (No), 'Cycle 1 Wait' (60), 'Cycle 2 Wait' (120), and 'Cycle 3 Wait' (240). The form also shows 'Modified On' as 4/22/2019 and 'Stopped' as No.

EVENT TYPE : SAVIN		Modified On	Stopped
Discharge		4/22/2019	No
General			
Event Type	Discharge	Do Not Process	No
Category	Urgent	General Notification	No
Notification Wait Time	0	Media Notification	
Owner	Danny Shannon	Include in SMS Limited	
		Do Not Send Letters	
Notification Governor			
Enabled	No	Stopped	No
Threshold Count		Last Governor Stoppage	
Threshold Time (minutes)			
Calls Cycles			
After Hours Calls	No		
Cycle 1 Wait	60	Cycle 2 Wait	120
		Cycle 3 Wait	240

Notification Event Types Configuration Screen

Messages

SAVIN360 provides the Program Manager and permitted staff to add the text of notifications that will be provided as well as modifying existing message text. Messages are associated with the notification event type (Notify Rule) for which they will be used and can be accessed from the Notify Rule screen:

Event Type	Category (Eve...)	Language	Phon...	Robo...	Email...	Lette...	SMS ↑	TTY
Discharge	Urgent	English	No	No	Yes	No	No	No
Discharge	Urgent	English	No	Yes	No	No	No	No
Discharge	Urgent	English	No	No	No	Yes	No	No
Discharge	Urgent	Spanish	No	No	No	Yes	No	No
Discharge	Urgent	Spanish	No	No	Yes	No	No	No
Discharge	Urgent	Spanish	No	Yes	No	No	No	No

Message List for Notification Event Type

The Message form allows you to write the message, associate it with a Notify Rule, define the delivery methods for which the message applies (allowing for variances in the message based on the delivery method—phone, email, letter, text, other), define the language for which it is used. SAVIN360 also provides a wide range of dynamic values that can be inserted into the text that would be drawn from the details of the Event, Offender, Facility, Case, Charge or other records involved in the notification process. The following screen shows configuration of a message (dynamic values are in curly braces; e.g., {Event Date Short}).

Media		SMS	TTY	Robo-Call
Event Type *	Discharge			
Phone	No	No	No	No
Email	Yes	No	No	No
Letter	No	No	No	No

Message

Language * English

Message

This is to notify you that this offender has completed the entire sentence required by law and was released from custody from {Facility Name} in {Facility City}, {Facility State} on {Event Date Short}. The offender will not be on supervision, meaning TDCJ will have no jurisdiction over the offender and the Parole Board cannot impose special conditions.

{Detainer List English}

<SV: SEX_OFFENDER_ENGLISH>

<SV: SAFETY_MESSAGE_ENGLISH>

Should the offender be returned to the custody of TDCJ under a new sentence, you will be notified of such and will continue to be notified of any subsequent activities.

Message Definition Screen

The list of dynamic values is maintained in a Knowledge Base article to allow Program Manager and permitted staff to add the values correctly.

Offender Display, Register and Notification Settings

SAVIN360 provides a method for determining how constituents can access offender data on the portal. There are three controls on each Offender record that are used for this purpose. These are:

- *Do Not Notify*: setting this to Yes will ensure that no notification is made to anyone; there is an override, if need be. This is handy when needing to perform data cleanup activities. The default is No, which allows all notifications to proceed as appropriate.
- *Do Not Register*: setting this to Yes will allow Offenders to appear in search results but will not allow a user to register from the portal. This is handy for high-profile cases in which a lot of media and other users wish to track an offender. A victim or survivor can still be registered through non-portal means or through proxy registration.
- *Portal Display*: this dictates whether the offender will appear in searches or in My Notifications. Setting options are:
 - o *Display*: show in all portal searches and My Notifications.
 - o *Display for Registrants*: show in portal searches and My Notifications only for people already registered for the offender.
 - o *Do Not Display*: the offender will not appear in any searches nor in My Notifications

The following screen shows the Notification configuration settings for the Offender. The Portal Display and Do Not Register features will be available for county administrators.

The screenshot displays a web application interface for configuring offender notification settings. At the top, a header bar contains the following information: 'OFFENDER : ADMIN' with a dropdown arrow, a user profile icon, and the text 'zzTestzz, zzTestzz'. To the right of the header, there are four tabs: 'Custody Status' (with a lock icon and the text 'Parole'), 'Facility' (with a lock icon and the text 'AUSTIN Parole Office ?'), 'SID' (with a red star icon and the text 'zz234567'), and 'MRD' (with the text '4/9/2030'). Below the header, there is a section titled 'Notification' with a blue arrow icon. This section contains five toggle switches: 'Do Not Notify' (set to 'No'), 'Do Not Register' (set to 'No'), 'Portal Display' (set to 'Yes'), 'Do Not Display' (set to 'No'), and 'Registrant Count' (set to '1').

Offender Notification and Registration Configuration

Operational Run Time Values

SAVIN360 provides a wide range of configurable system values that are applied during various processes. These values include confirmation email text, notification type prefix and suffix text (standard text used in notifications; e.g., email prefix), backdate global and specific values, and many others. The following screen provides a sample of System Values:

Active System Values

Key	Value	Category	Sub-Category	Long Value
ADMIN_GUID	9d724801-e490-e811-810f-14...	ADMIN	CONFIG	9d724801-e490-e811-810f-1458d04eab88
AGENCY_CANNOT_UPDATE_IN...	(0) attempted to update offen...	NOTIFICATION	FEED ISSUE	(0) attempted to update an offender that is curr...
ANALYST_ADDRESS	analyst address			8712 Shoal Creek Blvd. Ste. 265, Austin, TX 78757
ANALYST_EMAIL	analyst_email			victim.svc@tdcj.texas.gov
ANALYST_FAX	analyst_fax			512-452-0825
ANALYST_PHONE	analyst phone			800-848-4284
ANNUAL_CONTACT_FOLLOW_...	Email message English	NOTIFICATION	FOLLOW UP	Dear (0) (1), You have registered for notification ...
ANNUAL_CONTACT_FOLLOW_...	Email message spanish	NOTIFICATION	FOLLOW UP	Estimado (First Name) (Last Name), Gracias por r...
ANNUAL_CONTACT_FOLLOW_...	IVSS: Annual Follow Up	NOTIFICATION	FOLLOW UP	IVSS: Annual Follow Up
ANNUAL_CONTACT_FOLLOW_...	SAVIN: Seguimiento Anual	NOTIFICATION	FOLLOW UP	
ANNUAL_CONTACT_FOLLOW_...	Message for letter	NOTIFICATION	FOLLOW UP	Greetings (0), This is your annual reminder regar...
ANNUAL_CONTACT_FOLLOW_...	10	NOTIFICATION	FOLLOW UP	
ANNUAL_CONTACT_FOLLOW_...	SAVIN: Annual Follow Up	NOTIFICATION	FOLLOW UP	Greetings (Contact Name), This is your annual re...
BACKDATE_GLOBAL	2	NOTIFICATION	FEED ISSUE	
BD_MEETING_ENGLISH_LTR	Board meeting notification text...	NOTIFICATION	NOTIFICATION	This is to confirm your request to speak with the...
CALLCENTER_CLOSETIME	21:00	ADMIN	CONFIG	
CALLCENTER_OPENTIME	08:00	ADMIN	CONFIG	
CASEPULL_WITH_BOARD_EMAIL...	Casepull with Board Email Body	NOTIFICATION	NOTIFICATION	You have registered to receive notifications on t...

System Runtime Values List

Backdate Handling

SAVIN360 provides special handling procedures for backdated data, which can be a recurring issue from various data sources. At times, an offender's record is updated in the source data system for an event that is past. For example, an offender is released from prison on Friday, but the record is not updated until Monday. In this case, the data are 3 days old and may have been superseded by a booking in the meantime. SAVIN360 provides an alerting capability for this kind of scenario and allows Victim Services staff to validate the data and update the notification message accordingly prior to providing the notification. In addition, backdate logic can be varied by type of Event, so that 2 days would be the backdate threshold for most events, but for Transfer events, the backdate threshold is 5 days to accommodate stop-overs (a prison transfer in which the offender stays a night or two at a facility that is not the final destination).

Law Enforcement Notification

SAVIN360 provides a service whereby local law enforcement officials can be notified of upcoming prison releases back to their jurisdictions. This is an opt-in service in which approved law enforcement users receive a daily report of prison inmates who will be released within the next X days (X is configurable) to their communities. The law enforcement special access portal also provides the ability to generate this report for the current or past dates or for specific offenders. This feature is only available if the corrections Offender Management System provides sufficient data to SAVIN.

Facility Alerting

This feature extends notification beyond individual constituents and offenders to an alerting feature for citizens living near a facility, or who are interested in inmates at a facility. Constituents can sign up for notification when there is an emergency or other alert-worthy condition at a facility.

Service-Oriented Solution

While SAVIN360 is an automated notification solution, it also is designed as a proactive, service-oriented solution enabling victim services staff to manage the registration, notification and data quality management processes. This is not a fire-and-forget solution. There will be events that require CVAD review and decision making as part of the process. For example, record updates in jails and offender management systems occasionally are done well after the fact; when this happens, there may be conflicting data about the offender. Given the single-offender record nature of SAVIN360, this may result in a task for reviewing the impact of backdated data or custodial conflicts between facilities that needs to be resolved by CVAD staff. SAVIN360 provides CVAD tools to get out ahead of these issues and to address the notification accordingly before notification is made. Thus, as part of a SAVIN360 implementation, CVAD should expect to interact with the system in much greater measure than simply reviewing reports and notification/registration statistics.

Background Information

The following is provided in accordance with the Request for Proposals, section 3.3.2

.1 Name

Information Strategies, Inc
Dba: InfoStrat
5101 Wisconsin Avenue NW, Suite 420,
Washington, DC 20016
Ph: 202-364-8822
Fax: 202-364-8919
Email: sales@infostrat.com

.2 Form of Business Entity

InfoStrat is a C Corporation

.3 State of Incorporation

InfoStrat was established in the state of Delaware.

.4 Business Locations

InfoStrat is headquartered in the District of Columbia at the address listed above. InfoStrat has no other offices, however, many of our staff work remotely in other locations.

.5 Number of Employees

InfoStrat currently has 21 full-time employees.

.6 Type of Business

InfoStrat is a professional services consulting firm.

.7 Contractual and Technical Matters Representative

The principal contact regarding all contractual and technical matters concerning the Proposal is Danny Shannon. His contact information is:

Danny Shannon
5101 Wisconsin Avenue NW #420

Washington, DC 20016
T: 301-801-9434
Email: dannys@infostrat.com.

.8 Scheduling Representative

The principal contact regarding scheduling and other arrangements is Stacey Novak. Her contact information is:

Stacey Novak
5101 Wisconsin Avenue NW #420
Washington, DC 20016
T: 703-919-7459
Email: staceyn@infostrat.com

.9 Registered To Do Business

If selected for this contract, Information Strategies will register to do business in Iowa prior to start of work.

.10 Staff Roles

InfoStrat has no lawyers in our offices; all staff save for two HR and Finance staff are considered technical consultants.

.11 Subcontractors

InfoStrat includes the following subcontractors in our proposal:

InfoStrat will subcontract telecommunications functions to Westpark Communications, L.P (Westpark) for Call Center and IVR services. Westpark guarantees 99% uptime for IVR and live operators services. InfoStrat will work with Westpark to stand-up 24/7 Call Center operations and implement PBX, IVR and phone registration scripts. Call Center operators will be English and Spanish-speaking, however, Westpark also has agreements with translator services when they are needed.

Founded in 1968, Westpark Communications, L.P., is a certified MWBE, HUB, 24/7/365 Call Center located at 20475 SH 249, Suite 100 Houston, TX 77070. This primary call center is a 10,000-square foot facility housed within the HP/Compaq Campus, which was developed and constructed to HP/Compaq's stringent business continuity specifications (i.e., dual power grids, dual water supplies and back-up generators). Operations, Customer Service, Quality Assurance, Technical, Sales and Administrative Departments as well as the Westpark Training Center are also housed at this location.

For more than 20+ years Westpark has worked with a variety of IVR systems. Every Westpark account interfaces with the IVR system in some way (i.e., customized greetings, Check in/Check Out systems with alert notification, web interfacing, dial in-enter code-retrieve notice-opt for live agent transfer, combined non-real-time voicemail, messaging with real-time follow-me, call screening, bridging, conferencing, ACD and opt for live agent transfer). CenturiSoft (current IVR system) allows us to achieve flexibility and tightly integrated solutions per client requirements.

Westpark also has extensive experience with automated outbound electronic communications and will provide robo-call support for this project and ongoing operations.

The following contact information is provided for Westpark:

Business Contact:

Lisa Hebert
Account Executive
Westpark Communications, L.P.
20475 State Highway 249, Suite 100
Houston, TX 77070
W: (713) 260-5007
F: (713) 260-5048
M: (504) 491-1707
lhebert@westparkcom.net

Technical Contact:

Joshua Patten
Director of Information Technology
Westpark Communications, L.P.
20475 State Highway 249, Suite 100
Houston, TX 77070
W: (713) 785-3238
jpatten@westparkcom.net

Experience

The following is provided in accordance with the Request for Proposals, section 3.3.2

.1 Years in Business

InfoStrat has been developing database applications since 1987 (32 years).

.2 Years Experience with Services Sought

InfoStrat have been a Microsoft Gold Partner for several competencies, including Dynamics 365 for more than 15 years. We have implemented numerous solutions for State and Local Government customers in Dynamics 365, .NET, SharePoint and other Microsoft technologies. We have been implementing SAVIN360 since 2010 (9 years).

.3 Staff Expertise

InfoStrat consultants maintain a wide array of Microsoft certifications including Dynamics 365 Applications, Online Deployment, and Customization, DevOps, .NET, SQL Server, Azure, MCSA, MCSD. Most of our Dynamics 365 consultants have more than 5-years of experience with the platform; our Director of CRM Practice has nearly 20 years of experience with Dynamics 365. Our project manager has been a practicing Professional Scrum Master I and PMI-certified Project Management Professional (PMP) since 2013.

.4 Projects

InfoStrat has provide implementation services in .NET and Dynamics CRM for numerous government clients over the last five years. These range from federal customers such as the

Department of Veterans Affairs, the Defense Criminal Investigation Agency, Department of Homeland Security, and US Peace Corps; to state government customers in Michigan, South Dakota, Indiana, Illinois, Missouri, Mississippi, California, South Carolina, Tennessee and Virginia; to local governments such as the City of Chicago, City of San Jose, City of Phoenix, St. Louis County, Montgomery (MD) County, and the District of Columbia. Many of these are implementations of unrelated solutions, such as Grants Management, Constituent Management, Investigations Management, Executive Scheduling, Case Management, Recruiting and Marketing, and so forth.

Specific to the services requested, the following project details are provided:

Indiana Department of Correction (IDOC)

Project: SAVIN360 solution implementation

InfoStrat is the Prime Contractor

Dates of project and services: May 2010 to present

Contract value: \$3.2 Million

Project Description:

InfoStrat implemented and has provided ongoing support and enhancement services for SAVIN, the state's victim notification system using Microsoft Dynamics CRM to replicate the notification functionality in their legacy system. InfoStrat included the capability to add pictures of inmates and to connect the main state system to the numerous local county jails where many inmates are housed for shorter terms. With the new system, IDOC saw substantial improvement in overall service through personalizing notifications for victims, allowing them to decide specifics of how/when they want to be notified and improving information that is provided to victims, law enforcement, and other justice partners, and leverage current technology. Additional upgrades to the new notification system include more notification options, internet capabilities, and easy access to latest status for continual review for information and contact updates.

Services have been and are provided on schedule and on budget.

Project Contact:

Brent Myers, Director, Sex Offender Registrations and Victim Services

IGCS302 W. Washington St.

Indianapolis, IN 46204

Phone 317-233-8648

BMyers@idoc.IN.gov

South Dakota Office of the Attorney General

Project: SAVIN360 solution implementation

InfoStrat is the Prime Contractor

Dates of project and services: February 2014 to present

Contract value: \$350,000

Project Description:

InfoStrat implemented a new SAVIN360 system for the State based on the SAVIN CRM template developed for the State of Indiana. Significant enhancements were made to identify

victims and provide full-service support for them, thereby limiting notification options to constituents who are not victims. Other enhancements include expanded specialty portals for law enforcement and state's attorneys with alternative authentication in the specialty portals, implementation of the SAVIN IEPD (SSP-VN) data exchange for all data sources, implementation of robo-call notifications for specific situations, and proxy registration. Service have been and are provided on schedule and on budget.

Services have been and are provided on schedule and on budget.

Project Contact:

Jamie Reed, IT Administrator, South Dakota Division of Criminal Investigation
1302 E Hwy 14
Pierre, SD 57501
Phone: 605-773-4803
Jamie.Reed@state.sd.us

Texas Department of Criminal Justice

Project: SAVIN360 solution implementation
InfoStrat is the Prime Contractor
Dates of project and services: May 2018 to present
Contract value: \$680,925.35

Project Description:

Texas Department of Criminal Justice sought to create a sustainable, customizable Commercial Off The Shelf (COTS) system which replaced the Victim Notification System and merged the Texas Crime Victim Clearinghouse and Victim Offender Mediation Dialogue (VOMD) process into a fully integrated case management system. This solution provides automated notifications, a central source of information for crime victims, victim advocates, and criminal justice professionals and digitization of the VOMD process.

Services have been and are provided on schedule and on budget.

Project Contact:

Mary McCaffity, Deputy Director, Victim Services Division
Texas Department of Criminal Justice
8712 Shoal Creek Boulevard, Suite 265
Austin, TX 78757-6899
Phone: 512-406-5923
Mary.mccaffity@tdcj.texas.gov

.5 References

Letters of references have been requested of the following:

Indiana Department of Correction (IDOC)

Brent Myers: Director, Sex Offender Registrations and Victim Services
IGCS302 W. Washington St.
Indianapolis, IN 46204
Phone 317-233-8648

BMyers@idoc.IN.gov

South Dakota Office of the Attorney General

Jamie Reed, IT Administrator, South Dakota Division of Criminal Investigation

1302 E Hwy 14

Pierre, SD 57501

Phone: 605-773-4803

Jamie.Reed@state.sd.us

Texas Department of Criminal Justice

Mary McCaffity, Deputy Director, Victim Services Division

Texas Department of Criminal Justice

8712 Shoal Creek Boulevard, Suite 265

Austin, TX 78757-6899

Phone: 512-406-5923

Mary.mccaffity@tdcj.texas.gov

Termination, debarment, litigation, and investigation

None of the conditions specified in the RFP is applicable to Information Strategies, Inc.

InfoStrat has not had any contract terminated for convenience, non-performance, non-allocation of funds, or other reason.

InfoStrat has not been subject to default nor received notice of default or failure to perform on a contract.

InfoStrat has not been subject to any order, judgment, or decree of any federal or state authority barring, suspending, or otherwise limiting the right to engage in any business, practice, or activity.

InfoStrat has not been subject to any damages, penalties, disincentives assessed, or payments withheld, or anything of value traded or given up under any existing or past contracts as it relates to services performed that are similar to the services sought by this RFP.

InfoStrat is not subject of any pending or threatened litigation, administrative or regulatory proceedings, or similar matters related to similar services sought by the RFP.

Acceptance of terms and conditions

InfoStrat accepts the terms and conditions in section 6 of the RFP as written.

Certification letter

The signed Certification letter can be found in Attachment 1, included as a separate document.

Authorization to release information

The signed Authorization to release information can be found in Attachment 2

Firm proposal terms

InfoStrat affirms that the services to be provided under this proposal are available and all proposal terms, including price, remain firm for 120 days after submission on 10/25/2019.